

# YOUR VISION OF SUCCESS



ADAM CMEJLA

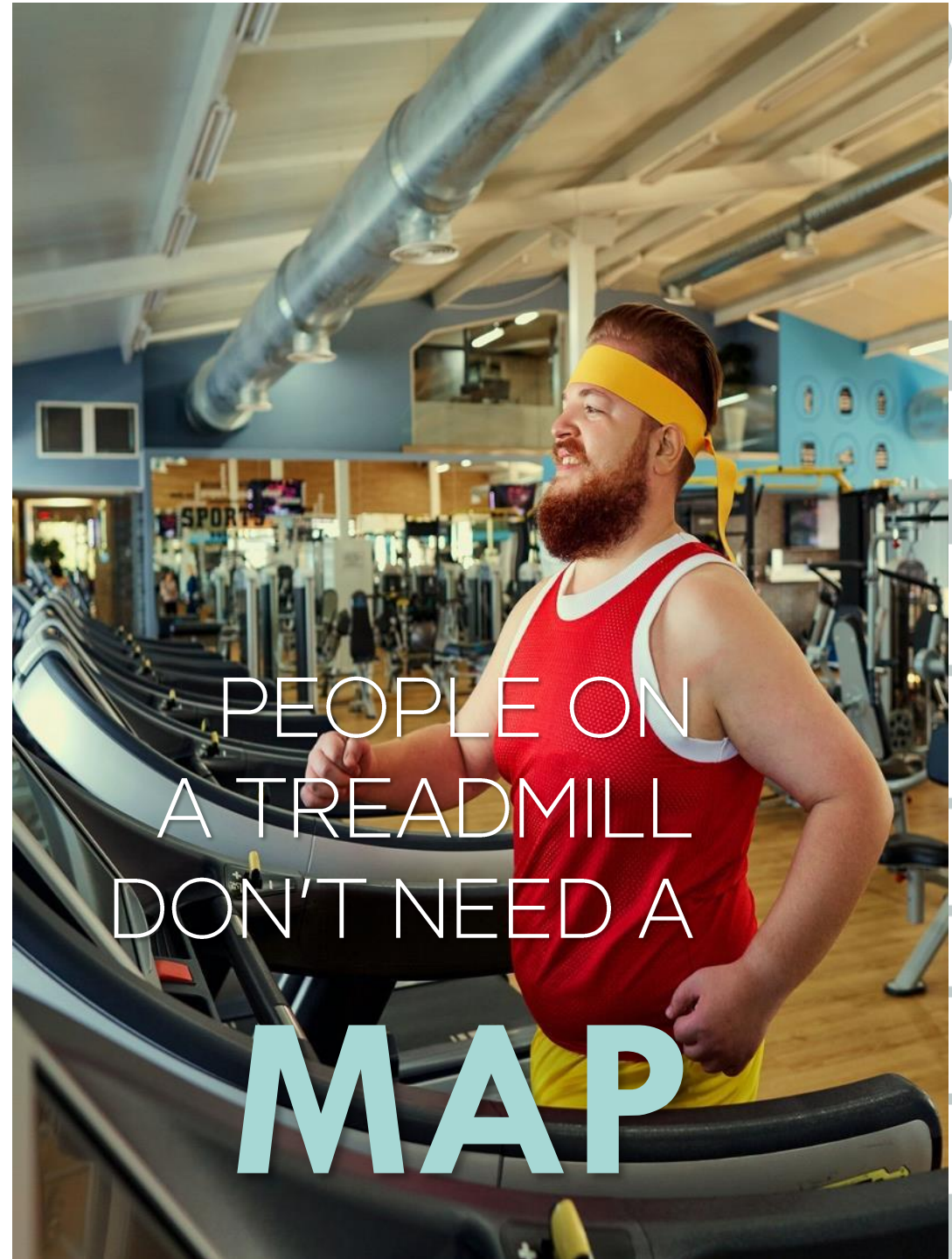


## WHY DO VISION PLANNING?

You're ready to create a clear and confident path that focuses you and accelerates your success.

## HIGHLIGHT THE GAP

between your current experience and your desired outcome to create a **ROADMAP FOR CHANGE**



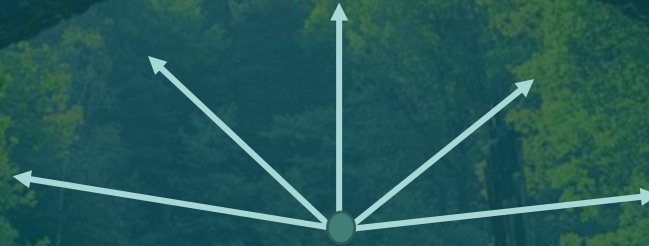
PEOPLE ON  
A TREADMILL  
DON'T NEED A

**MAP**

WHERE YOU ARE NOW  
*the experience you've created*



\$1M+ PRACTICE &  
TIME & FREEDOM TO ENJOY IT  
*the experience you want to create*



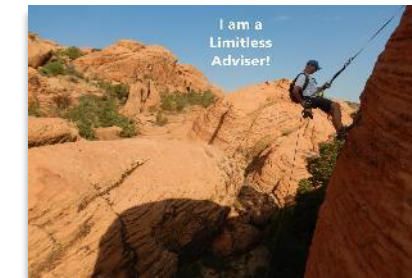
WHAT YOU'RE REALLY HERE FOR  
proven practices and coaching that help you bridge the behavior gap

# YOU NEED A WHY BIGGER THAN YOUR WHAT IF'S

"Grow my income \$100,000 a year so my wife can quit her miserable job and stay home with our kids; fulfill my dream of getting my pilot's license."

"Take Fridays off, grow revenue to \$750,000, pay off debts so we can enjoy a nicer lifestyle including 60 days of family travel."

"To simplify my \$1M practice so that I can work 2/3 time, stress-free, and deliver more value to clients in a simpler, more enjoyable way."





## ANNUAL PLANNING

Set / update your 3-Year Vision to create clarity about what and why



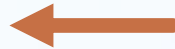
## KEY OBJECTIVES

Define the key outcomes you need to complete to achieve your 1-year goals



## 1-YEAR GOALS

The goals you need to hit this year to stay on track for 3-year Vision



## QUARTERLY PRIORITIES

The top 3 priorities most critical to achieve each quarter to achieve annual goals

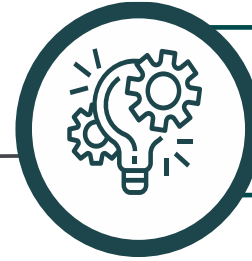


# LIMITLESS LAUNCH PROCESS

YOU CAN'T  
MANAGE  
WHAT YOU  
CAN'T  
MEASURE



## ANNUAL STRATEGIC PLANNING MEETING



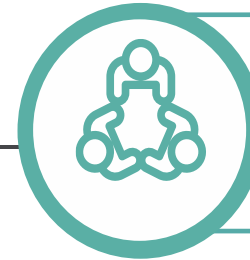
- Establish vision for future
- Set annual priorities and goals
- Align team and gain commitments

## QUARTERLY BUSINESS REVIEW



- Review financial performance
- Review practice & growth performance
- Qtr Priorities: status check, set next Qtr

## MONTHLY BUSINESS MEETING



- Finance review
- Pipeline review
- Schedule review
- Compliance meeting (optional)

## WEEKLY TEAM MEETINGS



- Open client service issues
- Upcoming meeting prep
- Prospect pipeline
- Align team and gain commitments



MISSION  
*your why*

The enduring reason for the company's work

To help people retire with financial freedom



VISION  
*your where*

Your desired future state, what you envision for the firm

To build a \$1M+ lifestyle practice that serves 100 clients, generates 60% EBOC, and supports the prosperity of owners, clients, and team



VALUES  
*your how*

The beliefs and behaviors that govern your culture and decisions

Authenticity. Advocacy. Well-Being. Continuous Improvement.



GOALS  
*your what*

The objectives and outcomes you want to achieve/experience

3-Year Goal:

- \$1M practice, doing work I love
- 75 ideal clients and 60% EBOC
- 30-hour work weeks & 8 weeks off to travel and be with family



MISSION  
*your why*

Help optometric practice owners “plan life, on purpose” and have positive impact at scale in the optometric profession.



VISION  
*your where*

Build a \$2M wealth management boutique for 200 optometric clients with a “small giant” advisory team of two advisors at 50% EBIDTA.



VALUES  
*your how*

- Abundance mindset
- Passion for excellence
- Remain curious
- Focused discipline
- Personal responsibility
- Act authentically



**Integrated Planning & Wealth Management, LLC  
Strategic Planning Meeting**

Rules:

1. The firm and our clients are bigger than each of us. Everything that we discuss today has to be through the filter of doing and saying what we need to do to serve clients well. IPWM is still the primary business and focal point of our energy.
2. Leave your emotions and feelings at the door. Don't sugarcoat anything. We're all adults.
3. Nothing is off the table or out of question. We're going to throw everything against the wall in this conversation and “see what sticks.”
4. “I don't know” or “nothing” is not an acceptable answer. There is always something that can be done to improve our business.
5. Accountability is key after this meeting and goes all around. We each owe it to the firm and our clients to hold one another accountable to our agreed-upon action items.

Mapping your BUSINESS VISION

OUR VISION FOR SUCCESS

MISSION	DESCRIBE WHAT THIS WILL LOOK LIKE:			
VISION				
VALUES				

	CURRENT (20_)	1-YEAR GOALS (20_)	3-YEAR GOALS (20_)	WHAT WILL IT TAKE?
REVENUE				
ALM				
AVER REV / CLIENT				
# DAYS OFF				
HOURS / WEEK				
# IDEAL CLIENTS				
OTHER				

LIMITLESS

# MAPPING YOUR BUSINESS VISION

My Model Practice

Design your Model Practice by answering a series of simple questions about how you want to live and work. Together, your answers create the framework for your Limitless practice.

HOW BIG DO I WANT TO BE?

How much revenue do I want to have?  
How much ALM do I want to have?  
How many clients do I want to have?

WHAT KIND OF LIFESTYLE DO I WANT TO ENJOY?

How much EBOC/income do I want?  
How many days off do I want?  
How many days a week do I want to work?

WHO DO I DELIVER MASSIVE VALUE TO?

Who is my ideal client?  
What are my minimum fees?  
What are my services?

HOW CAN I BEST INVEST MY TIME?

What is my RDT?  
What is my genius work?  
Who are my top three RPs?

LIMITLESS

An exercise in evaluating your goals, gaps, and what it will take to get there.

An exercise to help you create clarity about the practice you really want to build.



Watch Strategic Planning lesson

LIMITLESS

ODDS OF  
CHANGE ARE

9 TO 1

AGAINST  
YOU



CAUTION: SLIPPERY AHEAD

LIMITLESS

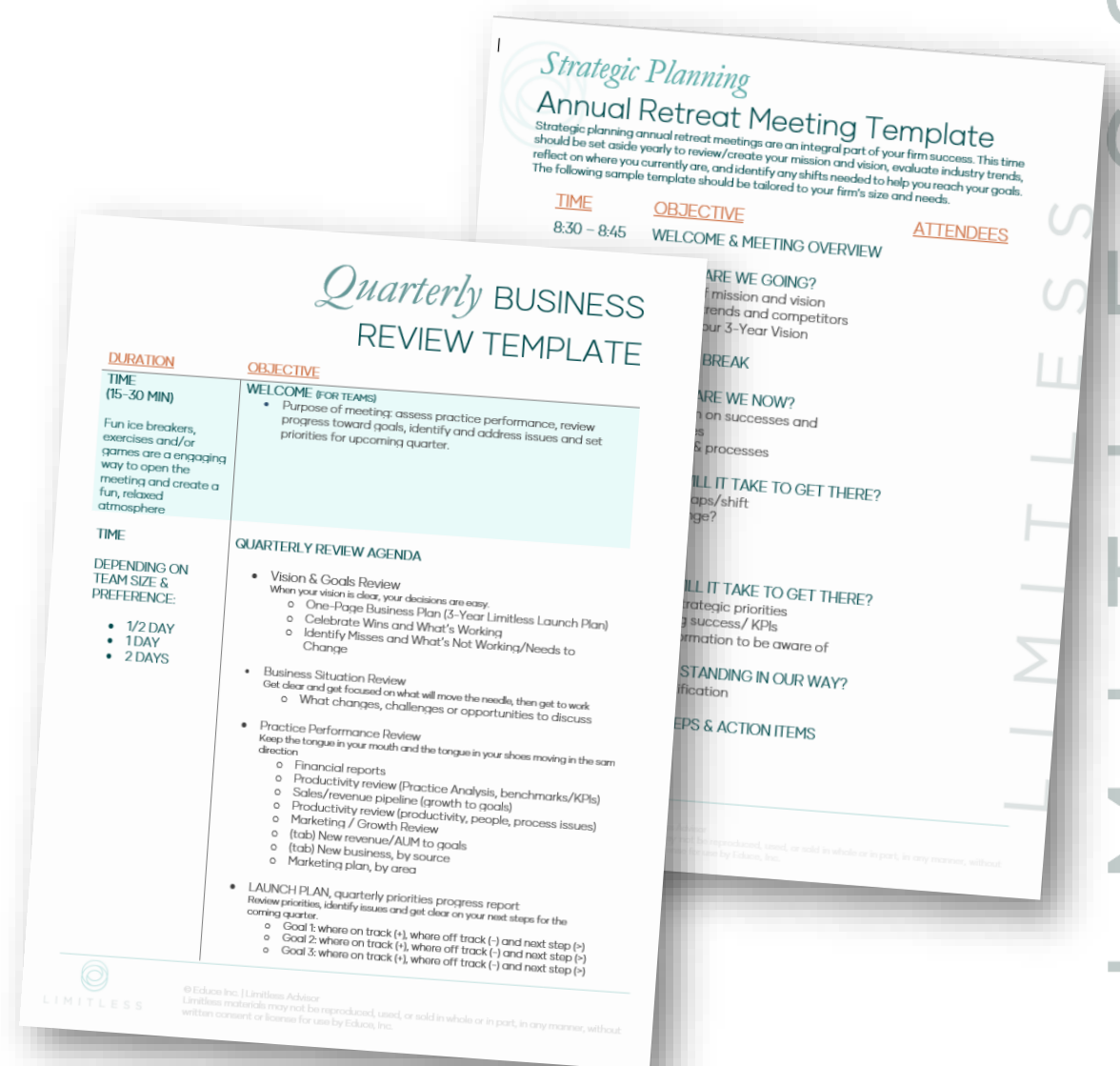
# STRATEGIC Planning Retreat

- Clarifies vision, goals and outcomes
- Focus on a 3-year time horizon
- Captured in 1 year business plans
- Implemented through quarterly priorities
- Tailor to your needs

LIMITLESS

# Quarterly BUSINESS REVIEW

- Evaluate and clarify priorities quarterly
- Set goals and success metrics
- Schedule work plan for next 90 days
- Update Daily Practices (Success Shifter / Habits Journal)
- Evaluate progress toward goals for quarter
- Establish goals and priorities for coming quarter



Watch Strategic Planning Lesson

3-YEAR VISION

**\$1M REVENUE + 100 DAYS OFF**

1-YEAR GOALS

**TAKE 60 DAYS OFF**

**AUTOMATE WORK-FLOWS**

**GROW REVENUE 20% to \$600,000**

KEY OBJECTIVES

Maximize time

Focus on \$1000/hr RPA

Hire part-time assistant

Build Client Service model

Draft core processes

Automate workflows

Increase Rev per Client to \$6,600

6 new clients from digital marketing

6 referrals

QUARTERLY PRIORITIES

Q1	<ul style="list-style-type: none"> <li>Implement annual calendar and time blocking</li> </ul>	<ul style="list-style-type: none"> <li>Hire Virtual Asst</li> </ul>
Q2	<ul style="list-style-type: none"> <li>Implement Calendly</li> </ul>	
Q3		<ul style="list-style-type: none"> <li>Hire Virtual Paraplanner</li> </ul>
Q4		

<ul style="list-style-type: none"> <li>Define segments services &amp; staffing</li> </ul>		<ul style="list-style-type: none"> <li>Hire Redtail consultant</li> </ul>
<ul style="list-style-type: none"> <li>Draft materials</li> </ul>	<ul style="list-style-type: none"> <li>Client reviews</li> </ul>	<ul style="list-style-type: none"> <li>Client reviews</li> </ul>
	<ul style="list-style-type: none"> <li>New client onboarding</li> </ul>	<ul style="list-style-type: none"> <li>New client onboarding</li> </ul>
	<ul style="list-style-type: none"> <li>Prospect process</li> </ul>	<ul style="list-style-type: none"> <li>Prospect process</li> </ul>

<ul style="list-style-type: none"> <li>Choose niche</li> </ul>	<ul style="list-style-type: none"> <li>Plan &amp; Prep for Q2 podcast launch</li> </ul>	<ul style="list-style-type: none"> <li>Re-launch niche to COIs</li> </ul>
<ul style="list-style-type: none"> <li>Fee increase to \$6,600</li> </ul>	<ul style="list-style-type: none"> <li>Google/SEO</li> </ul>	<ul style="list-style-type: none"> <li>24 COI meetings</li> </ul>
	<ul style="list-style-type: none"> <li>1,000 downloads</li> <li>20 digital prospects</li> </ul>	

CLARITY MEETS  
COMMITMENT

LIMITLESS

\$1 MM practice  
50%+ EBOC  
30 hr work week  
Fridays Off  
40 days OOO  
100 ideal clients



SUPPORTING LESSON:

# PRACTICE BENCHMARK

A tool to evaluate firm performance and gather analysis and insights to guide firm business planning and decision making.

**THE PRACTICE BENCHMARK ANALYSIS: INPUTS & HISTORICALS** LIMITLESS

**Instructions**

- In the cells to the right, select the current year and the quarter end data. Note: results will not be accurate if this information does not match inputs below.
- Gather data from the Firm Data Inputs column for the prior 3 years and for each quarter of the current year. Note: Current year data is YTD inputs for each quarter.
- For each year input your data into the light blue cells with grey text. Dark blue and white cells will automatically calculate.
- Review year-over-year changes to evaluate historical trends.

2021      Q4 YTD

Firm Data Inputs	2018	2019	YOY % Δ	2020	YOY % Δ	2021 Q1 YTD	2021 Q2 YTD	2021 Q3 YTD	2021 Q4 YTD	2021 Annualized	YOY % Δ
<b>Headcount</b>											
Partner Professionals*			*		*					-	*
Professionals*			*		*					-	*
Staff Members			*		*					-	*
<b>Revenue</b>											
Total (Gross) Revenue	\$0	\$0	*	\$0	*	\$0	\$0	\$0	\$0	\$0	*
Investment Management (AUM)			*		*					\$0	*
Investment Advisory (AUA) Fees			*		*					\$0	*
Financial Planning Fees (hourly or retainer)			*		*					\$0	*
Securities Trails & Commissions			*		*					\$0	*
Insurance Trails & Commissions			*		*					\$0	*
<b>Expenses</b>											
Total Expenses	\$0	\$0	*	\$0	*	\$0	\$0	\$0	\$0	\$0	*
Direct Expenses (Professional/ Adviser Compensation)			*		*					\$0	*
Indirect Expenses	\$0	\$0	*	\$0	*	\$0	\$0	\$0	\$0	\$0	*
Staffing			*		*					\$0	*
Overhead			*		*					\$0	*
<b>Clients</b>											
Total Clients			*		*					-	*
# of Fee-Based Clients			*		*					-	*
<b>Assets</b>											
Assets under Management			*		*					\$	-
<b>Lifestyle</b>											
Partner/Advisor Days Off			*		*	1546879302	154			0	*



## LEARN

- Your Vision for Success Lesson
- Action & Accountability Lesson
- 7 Pillars of a Limitless Practice  
*Stephanie Bogan*
- The Power of Practice Management  
*Stephanie Bogan*
- Start With Why
- Essentialism
- Traction
- Good to Great

*Simon Sinek*

*Greg McKeown*

*Gino Wickman*

*Jim Collins*



## APPLY

- **Watch**  
Learning Path: Clarity & Accountability
- **Review**  
Your Vision for Success Guide
- **Complete**
- My Limitless Life Exercise
- Creating Clarity Workbook
- Mapping Your Business Vision
- Practice Benchmarking Tool (Quarterly)
- One Page Business Plan



## ACT

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

# LET'S BREAKOUT!



Share My Model Practice  
& One-Page Business Plan  
Groups of 4  
Take 20!

### My Model Practice

Design your Model Practice by answering a series of simple questions about how you want to live and work. Together, your answers create the framework for your Limitless practice.

**HOW BIG DO I WANT TO BE?**  
How much revenue do I want to have?  
How much AUM do I want to have?  
How many clients do I want to have?

**WHAT KIND OF LIFESTYLE DO I WANT TO ENJOY?**  
How much EBQC/income do I want?  
How many days off do I want?  
How many days a week do I want to work?

**WHO DO I DELIVER MASSIVE VALUE TO?**  
Who is my ideal client?  
What are my minimum fees?  
What are my services?

**HOW CAN I BEST INVEST MY TIME?**  
What is my ROI?  
What is my genius work?  
Who are my top three RPs?

### One-Page Business Plan

Your Limitless Launch Plan

**\$1M REVENUE + 100 DAYS OFF**

- TAKE 60 DAYS OFF**
  - Maximize time
  - Focus on \$1000/hr RPA
  - Hire part-time assistant
- AUTOMATE WORK-FLOWS**
  - Build Client Service model
  - Draft core processes
  - Automate workflows
- GROW REVENUE 20% to \$600,000**
  - Increase Rev per Client to \$6,000
  - 6 new clients from digital marketing
  - 6 referrals

**QUARTERLY PRIORITIES**

Q1	Implement email calendar and time blocking	Hire Virtual Asst	Define engagement services & staffing	Client reviews	Client reviews	Choose niche	Plan & Prep for Q2 podcast launch	Re-launch niche to C2s
Q2	Implement Calendarly	Hire Virtual Transcriber	Draft materials	New client onboarding	New client onboarding	Fast increase to \$6,000	Google/SEO	1000 downloads, 20 digital prospects
Q3				Prospect process	Prospect process			
Q4								

# LIMITLESS Q&A

