

OCTOBER 1ST, 2020
ESSENTIAL TRACK
MARKETING IMPLEMENTATION – FROM IDEAS TO ACTION

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Stephanie Bogan: Alright so today we're going to talk about marketing implementation taking your ideas and turning them into action, as usual, you have me today, and this time we have advisor coach, Tiffany.

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00:00:48.180 --> 00:01:00.780

Stephanie Bogan: Who's going to be joining us because she's done such an excellent job of taking, not just the strategy, but the structure, right, the people, the process, the platform. The partnerships that we really support effective marketing implementation.

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00:01:01.170 --> 00:01:05.760

Stephanie Bogan: And really taking those to another level. So she will be joining me very much today.

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Stephanie Bogan: Alright, some housekeeping items. One our referral workshop session 202 with Carl Richards, which is in our expanded track call is on October 15

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00:01:16.590 --> 00:01:22.350

Stephanie Bogan: For those of you that were in that session or who have or are going to go out and watch it, which I encourage you to do.

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00:01:23.070 --> 00:01:27.780

Stephanie Bogan: That through referrals and some incredible workshop ideas about how to put those into practice.

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00:01:28.500 --> 00:01:40.200

Stephanie Bogan: And Carl tasked you with going out and having at least three client conversations and then bringing those back to the October 15 conversation. So you could talk with you and talk through right putting it into practice out in the real world.

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00:01:40.710 --> 00:01:52.020

Stephanie Bogan: So if you haven't watched that go watch it and put it into practice. So you can take advantage of that time. I'm so excited to share. We held our first new Weekly office hours. It was super fun concept it

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00:01:52.410 --> 00:01:59.760

Stephanie Bogan: Was it was really just a really robust conversation of all that invisible ink that I love to talk about that. We just can't even possibly cram

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00:02:00.270 --> 00:02:07.260

Stephanie Bogan: Into an agenda, but there's so much good magic there. So we had some great questions which are what those for obviously we want you to come listen and learn

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00:02:08.250 --> 00:02:14.280

Stephanie Bogan: But we also want you to come with specific questions about things that you're working on have questions on need to step on

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00:02:14.970 --> 00:02:27.780

Stephanie Bogan: So that you can put but what you're doing into action, which is what today's session is all about. And then today's download. You can click the link to the marketing accountability forum. So while we're getting started and I'm moving on to the next slide. I want you to take a deep breath.

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00:02:30.420 --> 00:02:36.300

Stephanie Bogan: I believe that you're all doing it, even though I can't see you, because by now you've probably figured out no matter what it makes you feel better.

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00:02:37.200 --> 00:02:45.060

Stephanie Bogan: To it actually makes your brain work allows you to sit down. Whatever you're thinking about and get really focused and present and engaged for this call, which is what Tiffany and I are doing

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00:02:45.990 --> 00:03:01.920

Stephanie Bogan: And enter in the chat box. What is your marketing roadblock today right now if Tiffany I said to you, what is the thing that is stuck in you re that is keeping you where you are. When it comes to marketing. What's that thing. And I'm going to sit here until at least 10 of you answer so

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00:03:03.000 --> 00:03:04.830

Stephanie Bogan: Time. Good one, Debbie. Thank you.

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00:03:05.910 --> 00:03:07.500

Stephanie Bogan: Time, Adam. Great.

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00:03:10.650 --> 00:03:17.310

Stephanie Bogan: They're way more than 10 of you messaged story. I don't know if it will work still stuck trying to figure out my niche time

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00:03:19.740 --> 00:03:25.470

Stephanie Bogan: Others. Other things that need my attention time shiny squirrels Tiffany's doing good by using a clear plan.

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00:03:26.040 --> 00:03:38.310

Stephanie Bogan: Creating digital sales funnels methods tactic. Okay, great. So equal parts mindset methods. And that's often the case. So as we go through implementation. I like that. Gary, we're going to talk very much about eating your elephant.

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00:03:39.030 --> 00:03:45.660

Stephanie Bogan: As we go through implementation. I want you to keep that issue in mind because we will get to it at some point. And if we don't

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00:03:45.990 --> 00:03:55.620

Stephanie Bogan: Make sure that you save it for Q AMP. A or drop it in. Because that is what we're here, finding the people to help me implement oh yeah we're covering that one to look at that we are prepared today. Alright, Tiffany. You ready

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00:03:55.800 --> 00:03:56.460
Tiffany Charles: I'm ready.

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00:03:58.770 --> 00:04:06.570

Stephanie Bogan: Alright, so let's talk about as we'd like to do, where we're going from and where we're going to what is holding you back really

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00:04:06.960 --> 00:04:13.320

Stephanie Bogan: I don't know how to try something new. I can't do that. Asking for help is hard. I don't have the time. I don't have the talent.

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00:04:13.830 --> 00:04:23.490

Stephanie Bogan: Right, so I need some help. It won't work. I literally we just saw those things in the chat. Like we speak from experience. Here's what we're moving to

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00:04:24.060 --> 00:04:32.640

Stephanie Bogan: And this is the, those are those hurdles those mental hurdles that tend to stuck, what I like to call stuck us write it and I want you to know that if it can't have been done before it can be done again.

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00:04:33.480 --> 00:04:43.740

Stephanie Bogan: Right. When I sat Tiffany And her firm down. I said the same exact thing like hey, there's a million dollar firm. There's 100 million dollar for and there's a billion dollar firm. Are they any smarter, better wiser good looking. No.

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00:04:44.580 --> 00:04:53.550

Stephanie Bogan: Okay, the differences, right, the strategy, and what you do with it right mindset and methods. So understand that anything that anyone in this group has thought about

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00:04:54.000 --> 00:05:03.000

Stephanie Bogan: To the best of my knowledge is within the realm of possibility of level of success. Don't try to jump off single you know tall buildings in a single bound. I'm not suggesting that

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00:05:03.570 --> 00:05:11.070

Stephanie Bogan: But what I am suggesting is that this second that you expect more Tiffany and I were talking about this in the prep call. The second thing you expect more

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00:05:11.310 --> 00:05:17.970

Stephanie Bogan: Is when things start to align from your brain to your business, your body to your bank account to create the reality that you really want

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00:05:19.140 --> 00:05:26.430

Stephanie Bogan: To you really do have all the tools you need. We'll talk about not getting overwhelmed. Not over complicating it keeping it simple.

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00:05:27.240 --> 00:05:34.980

Stephanie Bogan: But it's really about people process platform can partners and your most of that. So you have the lion's share of what you need.

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00:05:35.610 --> 00:05:41.580

Stephanie Bogan: The next is we, you know, it also happens to get things done better. So we have that hang up of

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00:05:42.270 --> 00:05:52.470

Stephanie Bogan: I don't have the time to do it. I don't have the talent to do it or I don't have the time to do it right. Therefore, it will sit and this is a coach ism a strategic coaches them to give credit where credit is due. But it's brilliant.

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00:05:52.920 --> 00:06:02.280

Stephanie Bogan: Which is, it's about who not how right it's all about leverage and how you create the outcome that you want a bigger, better one.

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00:06:02.640 --> 00:06:10.770

Stephanie Bogan: With less time, energy and effort that's what leverage is by definition. And then for those of you who are sharing that story. It won't work.

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00:06:11.130 --> 00:06:19.350

Stephanie Bogan: Here's what I'm going to tell you if you don't buy a ticket. You can't win the lottery. Right. If you start with it won't work. You're right. It's not going to work. And if you start with

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00:06:19.680 --> 00:06:23.100

Stephanie Bogan: Right incremental steps needlepoint moves will give me what I need.

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00:06:23.460 --> 00:06:31.980

Stephanie Bogan: To get that next level of substrate to get that next best step to get that next best step, then that's exactly what will happen. And then you'll see all those results on the right hand side of the screen.

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00:06:32.310 --> 00:06:37.200

Stephanie Bogan: So Jeff, I want you just, just before we dive into right the the mechanisms. Can you talk a little bit

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00:06:37.620 --> 00:06:47.040

Stephanie Bogan: About where you started, because I want you know everyone looks at you and the other advisor coaches, you know, and sort of these you know pedestals of success, which is awesome because you've earned it.

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00:06:47.610 --> 00:06:57.570

Stephanie Bogan: But I think that they forget it was only rate a you one, two or three years ago, two or three for really for all of you were, you were literally sitting in their same shoes.

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Stephanie Bogan: As some of you, Andrew told the story of, like, eight months in like the other code, you know, the other advisors who are coaches and they're both doing so great. What about me.

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00:07:05.850 --> 00:07:13.770

Stephanie Bogan: And then when he got it right off to the moon in the races. He went so to talk a little bit about that from like just a real relatable place, if you will.

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00:07:14.070 --> 00:07:18.090

Tiffany Charles: Yeah, and and to share something on that note stuff because I hear that they're like oh well.

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00:07:18.540 --> 00:07:26.400

Tiffany Charles: Like I hear like the I can't, I can't, like, I can't do what you're doing and I and I sometimes still find myself in that place like all see I'm

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00:07:27.090 --> 00:07:36.120

Tiffany Charles: Like I'll see Tanya. And I'm like, Oh my gosh, like how does she create all those searches so fast and like do all those things, or how did, how did you know how is how has been like

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00:07:37.140 --> 00:07:44.460

Tiffany Charles: You know, converting this many clients from the podcast or you like how did he build that and like what does that look like and what am I missing. And why can I do it and why am I not good enough.

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00:07:44.700 --> 00:07:55.800

Tiffany Charles: So like interesting enough on all of those things that came up for you as you said it. Like, I'm pretty sure I fell in all of those categories. At the time I met stuff like I was completely depleted like I

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00:07:56.130 --> 00:08:04.740

Tiffany Charles: had put myself out there. I asked to be part of a partnership telling them that like I can grow and transform this firm and I was floundering

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00:08:05.070 --> 00:08:15.030

Tiffany Charles: And um yeah I had really great ideas and I will at least I thought I did. But I started doubting myself in them, and I was willing to do the work. I

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00:08:15.390 --> 00:08:26.310

Tiffany Charles: Took the approach of harder, not smarter on day after day after day. And so it was when I met stuff and like the mindset shift of, like, okay, like

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00:08:26.790 --> 00:08:36.330

Tiffany Charles: The definition of insanity right like stop doing the same things over and over and over, like just just slow down and get clear and let's start with the mindset of, like, you can do it.

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00:08:36.960 --> 00:08:47.310

Tiffany Charles: And how do you take these big ideas and and go into smaller or why don't we look at this process and see where the friction points lie and just take a moment on that and

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00:08:47.670 --> 00:08:57.600

Tiffany Charles: It really for me was a huge mindset thing as soon as I could get over what was happening internally and just start focusing on one step at a time. So, for

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00:08:58.020 --> 00:09:07.350

Tiffany Charles: For Stephen I it started with. I'm going to commit to three revenue producing activities every day and I'm going to try to make those the first three things that I do every day. If I'm doing

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00:09:08.490 --> 00:09:21.780

Tiffany Charles: Revenue producing activities every week. There's no way I'm not going to see results and it became that simple. And then I was able to build like more intention on each one of those revenue producing activities like mice.

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00:09:22.320 --> 00:09:25.530

Tiffany Charles: That was a measurement of success for me if I did 15

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00:09:26.010 --> 00:09:26.820

Tiffany Charles: I will see results.

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00:09:27.120 --> 00:09:39.330

Tiffany Charles: So then I started seeing results. And I'm like, how do I increase or make these results better like or like, do I need to double my revenue producing activities. Do I need to make the ones that I'm doing more intentional more niche. Like how do I keep building that

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00:09:39.630 --> 00:09:57.450

Tiffany Charles: And that's, that's where it started and how and how it worked. And from there, I've been able to learn how to market and bring in business, in a way that served me authentically and served my partners and my team and so yeah

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00:09:58.320 --> 00:10:08.550

Stephanie Bogan: Well and TIFF, as you were talking, it was funny because I was thinking I didn't even remember it, but it was absolutely true, because I do it all the time, it was when when you're overwhelmed around marketing. It was Tiffany Do

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00:10:09.030 --> 00:10:17.130

Stephanie Bogan: Three things every day and the reasoning for that because I want you to understand how powerful it is as an exercise is your seating your success.

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00:10:17.580 --> 00:10:32.250

Stephanie Bogan: So pop quiz. Just to check and see if you're paying attention. Which of the four M's. The four modes of mastery mindset mapping methods or momentum. Do you think I'm driving to with pick three things, a day and just go do them.

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00:10:35.310 --> 00:10:36.780

Stephanie Bogan: Drop your answers in the chat.

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Stephanie Bogan: You might want to participate. There could be prizes. You just never know with

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00:10:42.210 --> 00:10:53.160

Stephanie Bogan: momentum. Momentum mindset mapping mapping. Yeah, it's a it's a momentum issue. I didn't even care what she did. I was like, write an email, make a call take somebody to lunch like remember there's no grand plan.

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00:10:53.790 --> 00:11:01.710

Stephanie Bogan: She was Tiffany was so below the line that can't don't know how I don't want to shouldn't want work around marketing and she was so defeated.

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00:11:02.220 --> 00:11:14.100

Stephanie Bogan: About what she thought it was going to take to get what she wanted to go the gap between where she was where she wanted to be when she calculated her growth trajectory was just having this coaching conversation with Tanya.

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00:11:14.610 --> 00:11:20.580

Stephanie Bogan: was bigger than she liked and it didn't create a positive response and she kept spinning your wheels trying to solve it. I know.

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00:11:20.790 --> 00:11:30.840

Stephanie Bogan: Many of you share that it just in a different. Some of you in a different form. But the pattern is what I want you to recognize. So sometimes the best next step.

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Stephanie Bogan: Is to just do a few little things. Each day, your success shifter is more than capable of keeping you on track for that and that momentum, then, did you hear what Tiffany said

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00:11:42.150 --> 00:11:50.070

Stephanie Bogan: Then I started that does looking at the numbers. Doing this making changes, then she hits mapping. Now she's got momentum.

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00:11:50.400 --> 00:11:57.330

Stephanie Bogan: And she's aware enough that wow I got to figure out, okay, great. Now I've got some speed going, I'm going to apply what I know to this.

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00:11:57.780 --> 00:12:04.590

Stephanie Bogan: Then she starts honing her craft and that's what if tweaking your methods is all about, right, and then

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00:12:05.340 --> 00:12:12.840

Stephanie Bogan: Then you're in that magic place of understanding that those radical, although small shifts in your mindset created these really radical results so

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00:12:13.770 --> 00:12:22.260

Stephanie Bogan: Momentum could be a method in that I'm using a method. So Dan's got a great question. I'm using a method in this case of strategy.

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Stephanie Bogan: To create momentum when I say methods contextually I'm talking about client surges or practice management thing a static, you know, staffing issue.

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00:12:31.500 --> 00:12:41.220

Stephanie Bogan: But yes, it is a it is both a strategy and a solution. In that sense, it's a habit builder. He's actually dense actually right. Alright, so let's talk about the nuts and the bolts.

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00:12:43.830 --> 00:12:53.310

Stephanie Bogan: Alright, so we've talked a little bit about this. And we've alluded to it a lot and I know this came up in one of the opening chance but is the one of the biggest probably the biggest hurdle.

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00:12:53.730 --> 00:12:55.500

Stephanie Bogan: That I see when it comes to marketing is

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00:12:55.740 --> 00:13:07.290

Stephanie Bogan: That our eyes are a lot bigger than our stomachs. I don't mean just in terms of the, you know, what we want to do in terms of the ideas and the shiny objects because we love those are and get excited about marketing, right, I'm going to do this and I'm gonna do this.

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00:13:07.530 --> 00:13:17.100

Stephanie Bogan: I'm gonna do this I'm spend this point has been this has been this plate and we know how that goes right back to, yo, yo, marketing, but I also made it in the context of

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00:13:17.760 --> 00:13:27.450

Stephanie Bogan: It is those small incremental steps like don't feel overwhelmed by that gap between where you're starting, whether it's newbie basic, you know, just getting off the ground.

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00:13:27.840 --> 00:13:39.510

Stephanie Bogan: Or right here in year three, and you're really diving deeper and really honing these concepts. Is it is about those simple repeatable steps. It is absolutely about momentum.

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00:13:39.930 --> 00:13:47.250

Stephanie Bogan: As much as anything else when it comes to marketing consistent momentum with mediocre methods will get you pretty darn good results.

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Stephanie Bogan: Consistent momentum with great limitless methods will get you extraordinary results even if you do a fraction of them. So it's much more important that you get clear on where marketing fits into your overall plan.

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00:14:03.930 --> 00:14:14.400

Stephanie Bogan: Including it might not be in your plan and Q4, except to prepare, prepare for next year. That's prep work. That's what we want to do in a business right it plan in advance and prepare ahead.

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00:14:14.760 --> 00:14:26.580

Stephanie Bogan: Whatever, it means it's about using Q4 to turn it into those incremental bite size pieces and to create a process that creates change. And we know that from the strategic planning and the launch learning

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Stephanie Bogan: It's about clarity, transparency and accountability. So I actually had Allison drop on just screenshots of the resources that we have in the learning library.

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Stephanie Bogan: Just to show you like it's all interconnected, even when you don't see it like this is what I'm thinking about like how do we create clarity. Let's put it in a playbook. Let's take a

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00:14:47.880 --> 00:14:55.710

Stephanie Bogan: One page business plan and make it really visual and simple so people can use it, let's use that success shifter to create an easy, easy way

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00:14:55.890 --> 00:15:04.440

Stephanie Bogan: To just build momentum that will ultimately carry on its own right. Let's go to transparency, like we got to have a simple plan that they can use that they're not going to shuffle away and never pick up right

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00:15:04.740 --> 00:15:15.690

Stephanie Bogan: So I wanted to just highlight this because there's a ton of resources here to create a track for you to run on that you're not coming to this, like, oh my god.

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00:15:16.290 --> 00:15:22.710

Stephanie Bogan: This is so big, whether it's getting around your story and your niche, whether it's just figuring out your strategy, and what to do.

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00:15:23.100 --> 00:15:29.760

Stephanie Bogan: Or actually designing the stuff and hiring the people are finding the partners, it can absolutely start to feel

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Stephanie Bogan: Overwhelming. And that is not the goal of marketing. The moment that that happens. You want to just get really grounded in marketing is a growth strategy that's supposed to feel good.

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00:15:40.080 --> 00:15:48.900

Stephanie Bogan: So whatever around it is not feeling good as a function of clarity function of transparency or a function of accountability. So use the tools and the resources that are there.

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00:15:49.200 --> 00:15:58.590

Stephanie Bogan: And you'll tweak them and refine them to make them truly yours, but they will give you as Tiffany will tell you they will give you that track to run on that will save you at 90% of the effort.

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00:15:58.890 --> 00:16:08.550

Stephanie Bogan: And make sure you're doing. And in a way, at least in terms of the general guard rules and guidelines, you're doing it in line with the best practices that we know are proven to work. So please take advantage of those

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00:16:10.140 --> 00:16:10.440

All right.

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00:16:12.030 --> 00:16:19.950

Stephanie Bogan: Okay, marketing momentum requires consistency and patients, Tiffany. I'm gonna let you talk about this one because you were just so this

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00:16:21.210 --> 00:16:22.620

Tiffany Charles: Patient was not my strength.

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00:16:24.600 --> 00:16:28.770

Tiffany Charles: Which is why I've actually put in those success measurements so that I can be like

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00:16:29.190 --> 00:16:29.640

Stephanie Bogan: Go on.

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00:16:30.870 --> 00:16:43.620

Tiffany Charles: The logo. Yeah, the plan, the plan helps with that though. Like we we promised this is what it would look like. Like we have data to show that this is when results come if we're consistent about delivering these activities.

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00:16:44.010 --> 00:16:54.600

Tiffany Charles: The results will come and it also helps me to be patient. When I have short term and long term and I have that somewhat defined because I know some of the things that I'm going to invest my marketing time in

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00:16:55.020 --> 00:17:00.210

Tiffany Charles: Are longer based and they're going to take time. So it helps me to know

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00:17:00.990 --> 00:17:15.300

Tiffany Charles: That and even with the long ones remembering there tends to be some wins. Along the way, like they don't they there's moments of them showing you that it's working. And it's shiny and it's going to be there. So I look for the good in all of it and but

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00:17:15.720 --> 00:17:24.240

Tiffany Charles: The only, the only like the Lather, rinse, repeat is the most important thing about the marketing like the consistency and I have to tell you there was

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00:17:25.200 --> 00:17:31.080

Tiffany Charles: A moment last year with destiny capital where my focus really needed to be internally into the team.

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Tiffany Charles: So I needed to do some opposite and really focus in on like the culture and make some shifts there because we

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Tiffany Charles: We just needed that as a team. So I did not see my CEO is for three months. And I certainly paid for that and opportunities and stuff like it was like rebuilding relationships and having certain things. So like

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00:17:50.310 --> 00:17:59.160

Tiffany Charles: If you, if you're going to commit to it. You have to have things in place to remain consistent because it loses its momentum so quickly. If you don't

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00:17:59.730 --> 00:18:09.120

Tiffany Charles: So the Lather, rinse, repeat and the way you Lather, rinse, repeat is by having systems in place that just allow you to show up and existence and that's how that's how you do that.

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00:18:09.780 --> 00:18:19.350

Stephanie Bogan: Well, and look, the simplest system to do that with is the succession of here. I know I continuously go over that every so every few months, but it's because it's like the silliest simplest way to make it work.

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00:18:19.740 --> 00:18:31.350

Stephanie Bogan: It will take about depending on the time and effort and it can absolutely as you have seen be quicker. But I also want to set a reasonable expectation in terms of rate your direction your strategy. Your applied effort.

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00:18:31.680 --> 00:18:40.620

Stephanie Bogan: Is it will usually take between 12 and often up to 36 months to see a really solid like radically awesome return on your investment because you're literally

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00:18:40.980 --> 00:18:44.250

Stephanie Bogan: Planting and sewing planting and sewing planting and sewing constantly

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00:18:44.640 --> 00:18:54.540

Stephanie Bogan: And sometimes it will really click the right person, the right opportunity again, the more your mindset gets align the more your expectations, raise the more you get into that above the line vibe. Tiffany will tell you.

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00:18:54.990 --> 00:19:06.180

Stephanie Bogan: Magic happens and things just flow that it would take so much effort to create it doesn't happen when you're not consistent right it's about just consistently making marketing a state of operation.

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00:19:06.660 --> 00:19:16.290

Stephanie Bogan: Even if it's an emergency teensy needle point move every single day, or every single week because that momentum.

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00:19:16.590 --> 00:19:26.670

Stephanie Bogan: Will make it inevitable for some part of your marketing, just to see if you continue to do at Conant tweak and refine it you will eventually it inevitably be some element of successful. Now we want to

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00:19:27.000 --> 00:19:36.330

Stephanie Bogan: Shrink that squash it accelerate it and blow it up. But the idea is what but but that's what our work is founded on because it just works. It's not sexy. It doesn't sizzle.

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00:19:36.720 --> 00:19:42.900

Stephanie Bogan: But man, it will really make you more successful. Yeah, alright, so here is the process one

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00:19:43.650 --> 00:19:53.220

Stephanie Bogan: Turn small strategies turn big strategies into small tasks, right, take the big overwhelm and turn it into simple organized simple tasks success shift or some other method.

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00:19:53.610 --> 00:20:00.480

Stephanie Bogan: To tag your team three create your real budget Tiffany's really good at this, for leverage technology.

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00:20:00.720 --> 00:20:11.340

Stephanie Bogan: Five accountability six know your pipeline and seven track and monitor your success. So this is a good place to take out your marketing accountability for them because we took these steps.

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00:20:11.760 --> 00:20:18.090

Stephanie Bogan: As we look to find more and more ways to make this practical during the call and to keep you focused and engaged after the call.

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00:20:18.360 --> 00:20:27.000

Stephanie Bogan: Is we built a form around the seven steps and that basically will take you through it with the same question. So you can check boxes and make sure that you're following along.

138

00:20:27.840 --> 00:20:33.660

Stephanie Bogan: Yes page exactly like compounding interest. One of my favorite sayings. I know I say that a lot. I got a lot of them.

139

00:20:34.140 --> 00:20:43.860

Stephanie Bogan: But I heard moons ago such that I can be. I don't even know who to give credit to but it's so true. And you know what, when you hear it, which is investment proceeds return

140

00:20:44.640 --> 00:20:53.280

Stephanie Bogan: Always I just never had an experience where they are the return came before the investment. And when you get your head around that. Going back to Michael's conversation at retreat.

141

00:20:53.700 --> 00:21:00.600

Stephanie Bogan: About what the real cost of marketing is you start to realize that you really do want to make sure that what you do is much more effective.

142

00:21:01.860 --> 00:21:12.810

Stephanie Bogan: Alright, Jeff. Let's talk about turning big strategies into small steps. Talk about how right, these, these kind of these items and how we do it. But talk about, like, you're right. I went home for my first retreat and did what

143

00:21:13.590 --> 00:21:25.800

Tiffany Charles: Yeah, so we're home from my first retreat and certainly did the marketing plan I realized that I had marketing all over the place, which made it really hard to create consistent process and

144

00:21:26.550 --> 00:21:39.930

Tiffany Charles: Be in a place where I'm just showing up and doing what I'm supposed to do. Also, I had too many things spinning and attempting to do that. So the plan helped me get clear on what's my time. What's my energy and attention so

145

00:21:41.100 --> 00:21:54.690

Tiffany Charles: Consolidation and keeping it clean and clear. And then the other thing is, as you all may have know by now brevity isn't my strong suit. And that is true in planning, as well as speaking

146

00:21:55.260 --> 00:22:07.890

Tiffany Charles: So everything I look at, I try to have simplified and I have I have mentors and people in place to help me simplify that, because it's not my strength. My strength is in that messy detail and then

147

00:22:09.300 --> 00:22:18.480

Tiffany Charles: Projects and processes. So I chose what I needed to do and creative processes around it so that marketing calendar is super strong for that.

148

00:22:19.350 --> 00:22:27.690

Tiffany Charles: Like okay, SEO wise, how many of my meeting. And then how many are being dripped on and is that built into our CRM great like client referrals.

149

00:22:28.110 --> 00:22:37.560

Tiffany Charles: Are we asking, are we slipping that paper across the table. Still, which, by the way, I've done all of it and it's some of the super uncomfortable and some of it. So you have to do what works for you. So that's

150

00:22:38.100 --> 00:22:40.770

Tiffany Charles: That was part of it. I'm like, that doesn't work for me like

151

00:22:41.280 --> 00:22:48.000

Tiffany Charles: Sliding a LinkedIn page across the table and asking someone like hey went through your LinkedIn. I see these 10 people would you be willing to make an introduction.

152

00:22:48.330 --> 00:22:54.150

Tiffany Charles: I did it. I didn't like it. It wasn't me it wasn't authentic to me. So for me, I was never going to get the return out of it.

153

00:22:55.080 --> 00:23:05.250

Tiffany Charles: So getting clear on that. And then I built in time, every quarter to check in on all of my systems and where we were allocating our time and process. So I had an

154

00:23:05.550 --> 00:23:16.290

Tiffany Charles: A piece of where are we, how am I doing, and there was times where I'm like yeah like I didn't commit to any of that. And the results are showing or so, then I know I have a mindset issue.

155

00:23:16.650 --> 00:23:25.980

Tiffany Charles: So I go back to those four m's like where am I at like, are we good and it's all working or is there friction and if there is friction. What is it,

156

00:23:26.400 --> 00:23:34.320

Tiffany Charles: And then the metrics and measures. So for any and all initiatives always I have, what do we consider success.

157

00:23:35.280 --> 00:23:44.820

Tiffany Charles: So when I started COI marketing, for instance, like my success wasn't for the first year wasn't based on introductions. It was based on

158

00:23:45.210 --> 00:23:56.730

Tiffany Charles: Am I getting people to a place where I'm moving them up or out, can I have to true influencing and CEO. Is that the end of the year. What does that look like to me. So just bite size because I knew the next year, I could up level.

159

00:23:56.940 --> 00:24:07.710

Tiffany Charles: Those two to being three plus referral SEO wise if I get them in that place. So just small bite sized metrics and measures that feel good to you so that when you hit them.

160

00:24:08.460 --> 00:24:16.350

Tiffany Charles: You keep that momentum going, and always been open to the fact that your metrics and measures, especially your baseline years

161

00:24:18.060 --> 00:24:26.580

Tiffany Charles: There is a good guess. Have any so like be open to the fact that you may have not put the right metric or measure down and then utilizing that as a baseline and move that forward.

162

00:24:26.940 --> 00:24:32.370

Stephanie Bogan: And we and we can talk more about that in the performance Benchmarking Tool. The practice Benchmarking Tool has loads of metrics in it.

163

00:24:33.510 --> 00:24:43.890

Stephanie Bogan: But I want us. I want to take a minute to pause here because I want to highlight something that I don't think Tiffany recognize and you guys may not have either. But it's important to one of the points that we're going to get to

164

00:24:44.190 --> 00:24:58.530

Stephanie Bogan: Which is did you all notice I wrote it down or so I'm looking over here. I'm not checking my phone. Did you all notice that Tiffany, said I, you know, a brevity is not my superpower. I'm really great at the messy details.

165

00:25:02.250 --> 00:25:09.870

Stephanie Bogan: And pausing perfect here. Does anyone besides me get the relevance of that when it comes to marketing and just how you feel about yourself in general.

166

00:25:10.920 --> 00:25:23.550

Stephanie Bogan: Which is, it's like, oh, I'm not this, or I'm not that Tiffany has really figured out, she knows her genius when it comes to marketing, you can't. I'm so sorry BG new set at all. You can't. I've tried we do

167
00:25:24.870 --> 00:25:29.760
Stephanie Bogan: I can't do it. I promise you a bit more time and effort and trying to be perfect. And most people I've ever met.

168
00:25:30.270 --> 00:25:40.350
Stephanie Bogan: It doesn't work it. You just can't. What you can do is leverage your strengths so that your weaknesses become irrelevant. Can I say that again.

169
00:25:40.710 --> 00:25:50.550
Stephanie Bogan: leverage your strengths so that your weaknesses become irrelevant. One of Tiffany strengths is complex detail messy details is where the value is

170
00:25:51.090 --> 00:25:54.840
Stephanie Bogan: communicating effectively is where simplicity comes into place.

171
00:25:55.530 --> 00:26:07.470
Stephanie Bogan: You can't steep yourself in the value know the value plan, the value prioritize the value build the checklist for the value navigate the multitude of things, it takes to deliver the value. If you are not good with complex messy details you need that.

172
00:26:08.550 --> 00:26:19.320
Stephanie Bogan: But it sometimes means that you're not also the right person to simplify a message asked me all about that, and I do it for myself and other people, but I have to get in and like I have two parts of my brain have to really

173
00:26:19.620 --> 00:26:23.340
Stephanie Bogan: Really shift zones. It's not my most effective use of time, by the way.

174
00:26:24.360 --> 00:26:25.440
Stephanie Bogan: Like at all.

175
00:26:26.670 --> 00:26:35.550
Stephanie Bogan: So what I want you to take away from here is right now pause and in the chat. Right. What is your genius when it comes to marketing. I think it's on your form, but we're going to add it

176
00:26:36.510 --> 00:26:41.040
Stephanie Bogan: Note to self by itself. I mean, Allison said before.

177
00:26:41.670 --> 00:26:54.480
Stephanie Bogan: Right. But what is the, what's the right passion and authenticity is it right that you're just a geek at systems and systems, by the way, are the secret to great marketing, right, Tammy awesome at relationships.

178
00:26:54.870 --> 00:27:03.240
Stephanie Bogan: Another secret to marketing figure out whether you're more on the people positioning packaging promotion side of it.

179
00:27:03.870 --> 00:27:18.780

Stephanie Bogan: Or if you're more right leaning toward bias towards right the process, the detail that the complexity of it or if you're blessed slash curse and you're like Tiff and I were you swing on both sides of that fence. You have to be really, you have to really, really manage that rate.

180
00:27:20.040 --> 00:27:30.120

Stephanie Bogan: So that I just want to highlight that activity and congratulate you, because to really stop recognize that and have built your marketing strategy team and process around it.

181
00:27:30.660 --> 00:27:41.610

Stephanie Bogan: That's that's limitless right there's no there's no doubt no reservation no lack there. It's just, that's not my strength. This is my strength. I'm building around myself so I want you all to take note of that.

182
00:27:47.160 --> 00:27:53.460

Tiffany Charles: Yeah, so I'm on tagging your team. I think this place in exactly what we just did.

183
00:27:55.560 --> 00:28:12.750

Tiffany Charles: Us ahead of it. But what skill sets and abilities. Do I have and what do I need, I also add what do you, what do you love like what are you passionate about. So back to that energy filling or energy draining and then who's going to manage my marketing plan so

184
00:28:13.860 --> 00:28:23.700

Tiffany Charles: That helps that helps a lot too. Are you are you in that strategic see or are you in that implementation. See, are you both. And at what point and like I always think about

185
00:28:25.590 --> 00:28:37.080

Tiffany Charles: My partner always asked, like how could you be doing less so I'm constantly asking myself that question and I think about that in marketing often on where my strengths are best put so and then the do is

186
00:28:38.640 --> 00:28:50.700

Tiffany Charles: Picking those focuses and where your skill sets are and learning the best practices of what may be great. So if you're if yours is people then that that one to one marketing or that

187
00:28:51.120 --> 00:28:59.070

Tiffany Charles: Direct Marketing maybe a really strong place so SEO is client advisory boards organizations, networking, all of that and

188
00:28:59.430 --> 00:29:06.570

Tiffany Charles: If its systems and processes, there may be a lot in like digital marketing that is super strong, not to say, and if it's both people in process.

189
00:29:07.140 --> 00:29:10.560

Tiffany Charles: That shows up in a lot of really great places and then delegate

190
00:29:11.550 --> 00:29:21.060

Tiffany Charles: So, you know, what about that follow up gift. What about that, thank you card. How do I make sure those things are in place, like do you do you handle all that. Do you hand that off to somebody

191
00:29:21.930 --> 00:29:31.800

Tiffany Charles: For me again I've hired an outside marketing team because I really needed help with the implementation and simplifying and making sure that

192

00:29:32.430 --> 00:29:42.240

Tiffany Charles: My strategies were coming across correctly to the target audience and it wasn't my my strength and it's quite draining for me. So I think about that.

193

00:29:43.980 --> 00:29:47.640

Stephanie Bogan: Yeah, and it's you know as Tiffany pointed out, and I think I want to highlight this it's

194

00:29:48.720 --> 00:29:48.990

Tiffany Charles: Okay.

195

00:29:49.020 --> 00:29:49.620

Stephanie Bogan: Can you hear me.

196

00:29:49.950 --> 00:30:00.840

Stephanie Bogan: Yes. Oh, it's, um, it's, it's not even about being amazing at it, it's about enjoying it. Right. Like if you if you don't generally find something to be an energy creating activity.

197

00:30:01.290 --> 00:30:07.920

Stephanie Bogan: It ultimately should be something that you try and get to someone else, whoever that team is right in house outsource virtual

198

00:30:08.580 --> 00:30:20.640

Stephanie Bogan: Part time full time an hour a week, you know, three hours a week to start. You'd be amazed at what you can get somebody to do in three to five hours a week, just as a starting point. And by the way, what right the momentum builds and it grows from there.

199

00:30:21.780 --> 00:30:30.390

Stephanie Bogan: So I think we're going to talk. I was gonna, I was gonna, I was gonna talk to Tiffany about the, the team, but that would be cheating and and we, I would once again get ahead of myself. So

200

00:30:31.050 --> 00:30:38.070

Stephanie Bogan: Adam I will like we're going to get to that in just a second. I do. Just because I'm in a very good mood today. I guess I want to give a shout out to Jared

201

00:30:38.610 --> 00:30:47.100

Stephanie Bogan: Because I noticed the Tiffany said that he's constantly reminding her to do less not more, which is a really awesome mindset to bring to your work.

202

00:30:49.140 --> 00:30:55.440

Stephanie Bogan: All right. Number three. Create your real budget real real real budgets include time because time is your

203

00:30:55.860 --> 00:31:04.500

Stephanie Bogan: Greatest revenue producing asset and done. You guys should have that one by now. If you don't have that in your dreams and you're sleeping newly tattooed on your body. I have failed in my mission.

204

00:31:04.890 --> 00:31:17.340

Stephanie Bogan: Time is your greatest revenue producing asset. So we want to make sure that you put your vision and action that's your marketing plan and your schedule, in terms of both dime and time and capital right like actual dollars.

205

00:31:18.030 --> 00:31:22.860

Stephanie Bogan: So plan time in your annual calendar. How much time do you have any did you start with marketing.

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00:31:23.850 --> 00:31:25.890

Tiffany Charles: Did I start with marketing.

207

00:31:26.760 --> 00:31:31.650

Stephanie Bogan: And how much time did you start allocating to marketing when you know those three activities, a day.

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00:31:31.950 --> 00:31:43.050

Tiffany Charles: Oh, the three activities, a day. I mean I it was maybe an hour of my day every day. And so I was probably closer to 20% and

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00:31:43.650 --> 00:31:53.790

Tiffany Charles: Just again for everyone to recognize. Like, that's my entire role. So about 80% of my time is now spent there, but I don't meet with clients or or run the firm by myself or anything along those lines.

210

00:31:54.330 --> 00:32:02.100

Stephanie Bogan: So it's about how much time that you spend. I often look at Michael study. I don't have it memorized. But I know the last study that we did.

211

00:32:02.430 --> 00:32:10.680

Stephanie Bogan: And I don't think it's changed a lot was the average advisor spends about 10% of their time on marketing and top quartile advisors spend about 30% of their time on marketing.

212

00:32:11.130 --> 00:32:17.730

Stephanie Bogan: And I'm pretty sure that the study I read really supports that. Because right time is focus and what you focus on expands.

213

00:32:17.970 --> 00:32:18.240

Tiffany Charles: Yeah.

214

00:32:18.540 --> 00:32:26.370

Stephanie Bogan: There's also a difference that I think is really important in terms of the timeline in your expectations around results. And I think, again, Tiffany, can speak to this in terms of

215

00:32:26.790 --> 00:32:33.510

Stephanie Bogan: Depth of commitment, time wise in particular is. There's the difference between building marketing and prospecting marketing.

216

00:32:33.750 --> 00:32:37.980

Stephanie Bogan: prospecting marketing is sitting across from someone writing the email working on the on the White Paper.

217
00:32:38.280 --> 00:32:45.210
Stephanie Bogan: Building marketing is buying MailChimp and setting it up and using your CRM and figuring out to create the workflows and

218
00:32:45.480 --> 00:32:51.270
Stephanie Bogan: Figure out who the team is it's going to do it on a regular basis and right sitting down with your team and putting it your schedule. That's

219
00:32:51.570 --> 00:32:58.350
Stephanie Bogan: Building marketing. So when you say I'm going to spend two hours a week marketing get really clear to people mess this up all the time.

220
00:32:58.950 --> 00:33:05.790
Stephanie Bogan: On how much time is spent to build and how much time is spent to actually go out and prospect or right engage in a

221
00:33:06.420 --> 00:33:09.930
Stephanie Bogan: Specific marketing activity right writing write something that sources business.

222
00:33:10.260 --> 00:33:17.910
Stephanie Bogan: And then the third and Tiffany and I were talking about this because it is really one of those layers that you don't always get to is there's a difference between a cash flow.

223
00:33:18.570 --> 00:33:26.100
Stephanie Bogan: Capital and can't, you know, an actual capital right cash flow is a there's cat there's free cash flow in the business and we're going to take you know \$1,000 a month. And we're going to

224
00:33:26.430 --> 00:33:38.190
Stephanie Bogan: Allocate it to marketing capital investments are right. We're going to allocate, you know, an extra \$50,000 as a capital investment to redo a website right using Tiffany as an example or rate for you guys obviously

225
00:33:38.670 --> 00:33:47.850
Stephanie Bogan: I have just been \$15,000 to rebuild my website. Um, so for some of you, those are cash flow commitments and they're a little bit easier to make, to be honest, and for some of you,

226
00:33:48.240 --> 00:34:03.720
Stephanie Bogan: For all of you would a specific time, you might find yourself considering a capital investment and again this is these are the places where I always take pause. I don't know about you, but it's where you want to take what I call conscious calculated risks.

227
00:34:04.980 --> 00:34:15.300
Stephanie Bogan: Do you have an informed educated strategy. Right. And do you have the resources that people to thinking that you feel good about with pause and reflection and all that we've taught you, like, Okay, I've

228
00:34:15.570 --> 00:34:24.120
Stephanie Bogan: My mindset my mapping become clear on this. I really challenged myself. I'm not stuck on any stories like, Okay, I've got a good strategy. It follows best practices.

229
00:34:25.080 --> 00:34:29.190

Stephanie Bogan: You really want to think about how you can best apply capital you

230

00:34:29.640 --> 00:34:38.880

Stephanie Bogan: Are your greatest return on investment. So, that time thing is actually true. But in terms of your asset but you, you, you, you are your greatest return on investment.

231

00:34:39.210 --> 00:34:49.410

Stephanie Bogan: And so I'm going to bet on you, every single day of the week in terms of right. I bet on me every day of the week in terms of where I put my money on the stock market. I love real estate. I love her other businesses.

232

00:34:49.770 --> 00:34:56.970

Stephanie Bogan: But this is the walk around like I know that I do it here as long as I get my ducks in a row, great things are going to happen on the other side.

233

00:34:57.870 --> 00:35:08.850

Stephanie Bogan: You build that confidence. And as those leaps get bigger than one comment turns into two courageous the thousand turns into 10,000 turns into 100,000 your confidence just builds and you go up and every next level, by the way.

234

00:35:09.750 --> 00:35:15.210

Stephanie Bogan: That part just generally doesn't go away. That's the app level. So take a moment right now.

235

00:35:15.570 --> 00:35:29.250

Stephanie Bogan: To think about and you've got this on your form the time and the capital that you're thinking is not permanent in ink. At this point, but that you're thinking about applying to your marketing for 2021 or your, your one page marketing plan.

236

00:35:30.990 --> 00:35:32.400

Stephanie Bogan: So just make a note of that.

237

00:35:34.020 --> 00:35:38.730

Stephanie Bogan: The action item here is to go to your annual schedule for next year this year.

238

00:35:39.210 --> 00:35:51.180

Stephanie Bogan: And mark it out right Monday afternoons or marketing meetings or Thursday mornings are, you know, breakfast or Tuesday and Thursdays from 11 to one or lunch days right Tiffany Did that very thing turn that into a weekly schedule.

239

00:35:51.720 --> 00:35:57.390

Stephanie Bogan: Put time in her weekly schedule to do three revenue producing activities, a day and then build from there and

240

00:35:57.930 --> 00:36:01.770

Stephanie Bogan: Great things happened in the smaller firm that she was in, and then she used that

241

00:36:02.400 --> 00:36:11.850

Stephanie Bogan: I don't know what to say. Confidence Tiffany and clarity and momentum to realize that the reason that she had been stuck was not issue. It just wasn't in the right firm. Not that they weren't great and wonderful and amazing people.

242

00:36:12.150 --> 00:36:21.360

Stephanie Bogan: It just wasn't aligned with her talents, where she could create the greatest value in an organization and what kind of really juiced her and what was her jam right and we all know that.

243

00:36:21.360 --> 00:36:23.580

Stephanie Bogan: Tiffany loves all things growth and marketing.

244

00:36:25.710 --> 00:36:30.600

Stephanie Bogan: I would never want to put Tiffany to drive where she just had to do processes, instead of hearing soon screen all day.

245

00:36:32.190 --> 00:36:34.170

Stephanie Bogan: Speaking of which, test, Tiffany. Tell us.

246

00:36:35.490 --> 00:36:37.500

Stephanie Bogan: How you've used technology processes.

247

00:36:38.070 --> 00:36:47.910

Tiffany Charles: Yeah, I mean, like, there has to be ways to like check in on it like leveraging technologies. The best way to do it right, like having an Excel spreadsheet is where I started with most of my

248

00:36:48.150 --> 00:36:52.380

Tiffany Charles: Most of my processes and then moving that into automation was great. I've used

249

00:36:52.950 --> 00:37:02.850

Tiffany Charles: I've used a sauna. I've used our CRM, which is juncture. I've used Salesforce. Like, you name it. I've used it and then you know any sort of the any sort of the

250

00:37:03.180 --> 00:37:09.810

Tiffany Charles: Digital stuff like there's, you know, Google Analytics, you just sign up for that know how your website is and then you can

251

00:37:10.050 --> 00:37:16.530

Tiffany Charles: Look into all of the digital stuff too. I've used Constant Contact MailChimp SendGrid you. So, you name it. I've tried all of it.

252

00:37:16.980 --> 00:37:21.300

Tiffany Charles: But it's all really important like you have to leverage the technology to create the systems because

253

00:37:21.690 --> 00:37:30.570

Tiffany Charles: Adding a COI one by one or sending individual emails every month doesn't work right like you need to be able to get them to a place that you can mass email them. So what does that look like

254

00:37:31.200 --> 00:37:39.150

Tiffany Charles: What are you, determining you're going to mass email them when you're just doing it, one month ahead or you're doing it two days before you're supposed to do versus having a calendar that says, hey,

255

00:37:39.600 --> 00:37:45.810

Tiffany Charles: You need to have a communication, written by the 10th and that way it goes out on the 20th and it hits compliance in any sort of whatever

256

00:37:46.170 --> 00:37:50.010

Tiffany Charles: And it makes it so much easier because then I build that into my calendar. Great.

257

00:37:50.670 --> 00:38:08.250

Tiffany Charles: Like, I'm going to always spend this Monday. Two weeks before the tons to write this to make sure I give myself time in case I get stuck or have a creative block to get this down and done. And so this is where you build your rinse lather repeat, I think, is the technology.

258

00:38:08.580 --> 00:38:17.520

Stephanie Bogan: Absolutely. And the thing I would add to that, because I think it's the color that makes it even more successful, which is, and I wrote this down because I wanted to get it right, which is

259

00:38:17.910 --> 00:38:27.540

Stephanie Bogan: It really creates the leverage race we talk about leverage a lot right people and process and platform. But when when I heard you say it, it really became clear for me that it creates the leverage

260

00:38:28.620 --> 00:38:41.190

Stephanie Bogan: Here's why it's so important. It creates the leverage that allows you to repackage the content, whatever it may be, to repurpose it in marketing speak but what you're really doing. And this is the value

261

00:38:42.030 --> 00:38:54.540

Stephanie Bogan: Is you're repurposing your time because you write the email once and you get the value 100 times 1000 times 10,000 times better thousand times depending on how good you get at right the craft of marketing.

262

00:38:55.110 --> 00:39:03.180

Stephanie Bogan: That's what I want you to think about in terms of giving yourself the time on the calendar really investing creating deep work time even if it's an hour to a week.

263

00:39:03.480 --> 00:39:10.560

Stephanie Bogan: To really do do engage not distracted. Do the things on your marketing plan consistently.

264

00:39:10.950 --> 00:39:20.760

Stephanie Bogan: Pick a few simple things get sticky do them over and over. Lather, rinse, repeat and it will start to work every single time, then you build on that momentum.

265

00:39:21.420 --> 00:39:31.020

Stephanie Bogan: So again, we use a sauna for project management. If you are desperate. There is a marketing cash tracker is basically in a spreadsheet that you can use to track your marketing tasks.

266

00:39:31.380 --> 00:39:42.540

Stephanie Bogan: Right whiteboards calendars schedules CRM and technology are an awesome way. I'm very visual. So I still like to see the visual things right calendars and Atlanta does calendars, all kinds of fun stuff.

267

00:39:44.190 --> 00:39:45.150

Stephanie Bogan: Yes, so

268

00:39:46.200 --> 00:39:58.020

Stephanie Bogan: So yes, some of these like this one in the back is trout. If I think that's one of your screenshots from way back when a son is the second one, the third one with the crown is an actual CRM.

269

00:39:58.350 --> 00:40:06.030

Stephanie Bogan: The fourth one with the green boxes and buttons is an actual workflow system and the tiny little box in the back corner that we're not encouraging you to use

270

00:40:06.360 --> 00:40:14.430

Stephanie Bogan: Because we don't want it to be for section is the marketing test tracking for him. But in the absence of anything else it will work. And we want to make sure you have something

271

00:40:16.260 --> 00:40:22.140

Stephanie Bogan: All right, I see a couple of questions popping up but they're not all my screens. Let me open those in my mouse know where my mouse.

272

00:40:28.470 --> 00:40:31.800

Stephanie Bogan: Minnie Mouse. Can you want to advance the slides for me.

273

00:40:34.110 --> 00:40:34.680

It's hilarious.

274

00:40:38.190 --> 00:40:41.850

Tiffany Charles: Can you hear me, I can hear you. But I can't be done. So I

275

00:40:41.880 --> 00:40:43.350

Limitless Adviser: can admit them either.

276

00:40:45.390 --> 00:40:51.870

Limitless Adviser: Once you want me to share my screen. And do you see, do you see the Q AMP a maybe we could do this for a second. I can

277

00:40:51.870 --> 00:40:57.030

Tiffany Charles: Yeah, absolutely. So I'm like questions.

278

00:40:57.060 --> 00:40:58.140

Stephanie Bogan: Perfect for me, of course.

279

00:40:59.310 --> 00:41:00.090

Stephanie Bogan: Read the question.

280

00:41:00.540 --> 00:41:06.210

Tiffany Charles: Sure. So, Tiffany, who's the outside marketing team that you've hired and

281

00:41:07.980 --> 00:41:19.950

Tiffany Charles: So I can talk about this. So I've, I've hired a boutique firm here in Colorado called pass. Click media that'll handle all of our digital marketing. So website maintenance to email to content.

282

00:41:20.940 --> 00:41:28.770

Tiffany Charles: Our podcast editing and transcribing so there's somebody that I've known for a while. Here I hired the engine is red to

283

00:41:29.580 --> 00:41:43.800

Tiffany Charles: It's going to come out soon. But our entrepreneurial lines niche that we built to do our website and I spent a lot of a long time, not a long time but I I gave about two

284

00:41:44.580 --> 00:41:52.020

Tiffany Charles: Two to five hours depending on my marketing vendor on like who I was gonna hire so I interviewed five for both just to make sure I was very clear.

285

00:41:52.830 --> 00:42:01.170

Tiffany Charles: And then I I reached out to other coaches and people in the community on like, Hey, what are you doing, so it was a determination of do we hire someone in house.

286

00:42:01.560 --> 00:42:19.830

Tiffany Charles: Do we hire a boutique firm that has a team that they can do it under all one roof or do I hire specifically like I know Taylor's done really well with this, but like firms that do really well in writing, and then another firm here and you can tend to get you tend to get more in each

287

00:42:20.940 --> 00:42:33.660

Tiffany Charles: Will like the individual ones like you can get more. I think you can get more specialty for your dollar. And each one. And so, and then we just happen to find a place that has several different seats in those specialties under one roof.

288

00:42:35.100 --> 00:42:45.810

Stephanie Bogan: And we've got resources on the resource list official list is called ranging in prices right because it's obviously very different depending on where you are in your practice lifecycle.

289

00:42:46.560 --> 00:42:53.730

Stephanie Bogan: We also have our new marketing resource which I'm really excited about sharing with you, although I'm sure she'll get busy really quick, which always happens.

290

00:42:54.600 --> 00:43:02.640

Stephanie Bogan: Who's not a big agency right of it. Some of them I feel really good about who started a firm and rain. She's just taking on clients to really start to provide that kind of

291

00:43:02.970 --> 00:43:11.250

Stephanie Bogan: soup to nuts help for people that are not quite ready or don't have, you know, really all ready to go all in. But who definitely are like, I don't have the time or the talent to do it on my own.

292

00:43:11.910 --> 00:43:17.910

Stephanie Bogan: So we've added her to that list, and we'll keep you guys posted. So if you need help with that, please let us know. But there's some great resources there.

293

00:43:18.150 --> 00:43:24.990

Stephanie Bogan: Yeah, continue to add them as we find them. The issue is honestly we find them. We mentioned them, they get busy.

294

00:43:25.350 --> 00:43:25.770

Tiffany Charles: They do.

295

00:43:26.310 --> 00:43:27.510

Stephanie Bogan: Go find new ones.

296

00:43:27.690 --> 00:43:29.040

Tiffany Charles: Yeah, further

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00:43:29.100 --> 00:43:34.680

Tiffany Charles: Further bound was certainly that way and Kathy has Kathy has great success in working with people who are

298

00:43:34.800 --> 00:43:45.180

Tiffany Charles: Like Stephanie said somewhat newer to the business and you get you get a lot for your dollar. And they're really hungry and they're looking to be impressive. So, I, I'm never against trying or hiring somebody

299

00:43:45.990 --> 00:43:52.290

Tiffany Charles: Who's building their own business and more in that startup area like they tend to do very good work great.

300

00:43:53.640 --> 00:44:02.250

Stephanie Bogan: Alright, so let's now talk about number six, because that's a good one, which is know what your pipeline. So this is really about

301

00:44:02.520 --> 00:44:09.090

Stephanie Bogan: All those phases we talked about when we first talked about marketing strategy I did figure out it was a zoom issue. By the way, I think it must be one of those

302

00:44:09.600 --> 00:44:16.530

Stephanie Bogan: New features that glitch because it was like there and then it wasn't there. And then it popped in and out. So, okay, if you guys have any more issues, let me know.

303

00:44:17.400 --> 00:44:26.430

Stephanie Bogan: But I think I solved it by stopping and starting again. Right. So know your pipeline business strategy right market is really about vision, goals product and pricing.

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00:44:26.790 --> 00:44:33.270

Stephanie Bogan: We start with marketing strategy. We've talked about goals position packaging right branding story, all of that.

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00:44:33.570 --> 00:44:40.680

Stephanie Bogan: Awareness is where you're out in the world, creating outreach creating awareness around your brand your story and the value that you deliver

306

00:44:41.040 --> 00:44:47.580

Stephanie Bogan: Education is where it leads actually start to happen. This is where your marketing map or your massive action plan kicks in.

307
00:44:48.240 --> 00:44:54.270
Stephanie Bogan: Because this is where right you're really starting to generate the lead process. The process of marketing will obviously start earlier.

308
00:44:54.840 --> 00:45:02.940
Stephanie Bogan: Education leads to engagement right once people become aware of you, they have been nurtured by you educated by you.

309
00:45:03.180 --> 00:45:11.940
Stephanie Bogan: Then they genuinely begin to engage with you when the emails come in, they look forward to opening and reading them they click on the links more they take you up on the free offers and then

310
00:45:12.210 --> 00:45:18.900
Stephanie Bogan: Right when the time is right. If it's right. Right. They actually then move to the sales phase or the acquisition phase.

311
00:45:19.590 --> 00:45:28.890
Stephanie Bogan: This is where the lead becomes a prospect right we ultimately go online and onboard them and move into the client service model. So in each phase in this pipeline.

312
00:45:29.160 --> 00:45:31.980
Stephanie Bogan: I'm not sharing this again because you need to memorize the pipeline.

313
00:45:32.370 --> 00:45:41.970
Stephanie Bogan: One, you need to be familiar with it, because when we talk about knowing your pipeline, we're talking about understanding your data in terms of you for Tiffany talk about tracking your metrics.

314
00:45:42.510 --> 00:45:53.130
Stephanie Bogan: Even if it's just you do not think that because Tiffany is now in a much larger firm that this does not apply to you it all applies to you. She used every bit of it in a smaller firm to create the success

315
00:45:53.550 --> 00:46:05.190
Stephanie Bogan: That got her to the larger firm but this is the same model that I use for solo advisors, way back when, when I was starting out, that worked. And it still works today, which is no joke, the success shifter. If you don't have any other option.

316
00:46:05.610 --> 00:46:17.670
Stephanie Bogan: Literally track how many outreach as you did, how much time you spend an actual marketing time or in build time. How many contacts you had how many people you talk to, how many meetings you held. How many people said yes, no, or maybe

317
00:46:17.910 --> 00:46:22.020
Stephanie Bogan: How many people close to me center like you can put all that in a in a succession after

318
00:46:22.350 --> 00:46:32.850
Stephanie Bogan: Track it and get loads of great data every single month in real time. That's literally what I did in the practice that. That's how I began the process of turning a very non successful practice.

319
00:46:33.240 --> 00:46:35.490

Stephanie Bogan: Into a very successful. One is that simple form.

320

00:46:36.150 --> 00:46:44.910

Stephanie Bogan: So, don't, don't look at this one and be like, yeah, just too boring little pipeline. It's about knowing your data, but in Tiffany and I were talking about this. It's about knowing your data.

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00:46:45.180 --> 00:46:52.800

Stephanie Bogan: And if you want to know more about this. We talked about it in the marketing breakout from retreat. It's about understanding your data by level.

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00:46:53.640 --> 00:46:59.460

Stephanie Bogan: Right, so your strategy data is that creating the kind of awareness, you want, how do you track and measure that well.

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00:46:59.640 --> 00:47:05.100

Stephanie Bogan: How many emails are open versus not versus education. How many people are clicking through on the links are downloading

324

00:47:05.340 --> 00:47:15.330

Stephanie Bogan: Rate engagement. How many people are downloading the white papers, what are the best practices. What are the numbers that I should be comparing to for downloads like for every hundred people that visit the website. How many people should download

325

00:47:15.810 --> 00:47:20.910

Stephanie Bogan: And we talked about, then the most important baseline number for a benchmarking is where you start.

326

00:47:21.450 --> 00:47:29.190

Stephanie Bogan: benchmarks are great. They're awesome. But when it comes to marketing. It only matters where you are and that you're moving incremental and the direction of your goals.

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00:47:29.760 --> 00:47:34.740

Stephanie Bogan: And then you get to that point where you're really like Tiffany anatomy. The others like Taylor digging in and Android.

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00:47:35.220 --> 00:47:40.110

Stephanie Bogan: honing the details, but I want you to be aware of that. First is about getting the process in place.

329

00:47:40.500 --> 00:47:46.500

Stephanie Bogan: And implementing a plan and every step of the process. It will be a much better plan when you think about it, soup to nuts.

330

00:47:46.830 --> 00:47:55.140

Stephanie Bogan: But then there's a whole nother layer within each level I call that honing your craft. That's when you're like, Okay, I got it gave Nelson. If you're on.

331

00:47:55.530 --> 00:48:04.770

Stephanie Bogan: You and I talked about this in our coaching call, I think, three or four weeks ago, like he took everything and he just went and did it and need even do it all. Perfect, I'll tell you, but it like started to work.

332

00:48:05.580 --> 00:48:10.470

Stephanie Bogan: And now he's like, what do I do next and like nothing. You don't go at anything it's working.

333

00:48:10.800 --> 00:48:21.210

Stephanie Bogan: Now we're going to do this deeper dive. I'm starting to hone your craft at every single level right is the strategy super tight, are we picking the right things can we make some pivots. Does the data support it, does it not

334

00:48:22.050 --> 00:48:36.330

Stephanie Bogan: Anything you want to add to that, Tiffany. I know I get. I get way too excited about geeky stuff like this. But it's because it really matters. You cannot manage or make better what you cannot measure you can but not terribly efficiently and we're all about efficient and effective here.

335

00:48:36.720 --> 00:48:47.280

Tiffany Charles: Yeah, no, I think you've hit it, but dance Souter did have a question on what do you mean by education and example would be really helpful. So I think that if you have the moment to speak to that. I think that'd be time well spent.

336

00:48:47.760 --> 00:48:55.890

Stephanie Bogan: Yeah. So, for example, awareness would be on social media. If you follow me on Twitter, LinkedIn, I'm we're always posting stuff.

337

00:48:57.180 --> 00:49:08.370

Stephanie Bogan: Education is where we're posting something that's actually going to deepen your knowledge and add real value around something so where this would be one of my I think Tiffany calls him Stephanie isms.

338

00:49:08.610 --> 00:49:17.520

Stephanie Bogan: Which you're apparently about to see on social media because you guys really like them. Definitely the the marketing person that I mentioned that I shouldn't say this will be so busy she'll do more work for me.

339

00:49:19.140 --> 00:49:21.030

Stephanie Bogan: I have an attitude of abundance, she she

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00:49:21.090 --> 00:49:28.920

Stephanie Bogan: She likes got so much feedback about how much people like them and use them constantly that she came up with the whole social media campaign about Stephanie isms. And they have numbers now and

341

00:49:29.250 --> 00:49:31.830

Stephanie Bogan: Makes me feel goofy to talk about it, but apparently it's a thing.

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00:49:32.220 --> 00:49:42.960

Stephanie Bogan: So that's awareness, right. Hey, I'm here. This is like you're going to read that stuff. You're going to know my personality. You're going to know if you're driving with me or if you're not like it's unmistakable. And I'm really okay with it.

343

00:49:43.470 --> 00:49:54.900

Stephanie Bogan: Education Dan is where I then drop the article with some practical tools are where I do like we did that open series with me and Michael kisses and Adam and Tiffany we did for webinars for free.

344

00:49:55.530 --> 00:50:10.740

Stephanie Bogan: We had thousand some odd people like that's a lot of stuff to give away for free months in advance of lunch. We just did it purely to educate as brand and thought leaders in the space like that was the goal engagement.

345

00:50:11.070 --> 00:50:21.030

Stephanie Bogan: Is then we then took that summary have a writing firm that were really happy with their resource list and had them do like a call to action summary.

346

00:50:22.080 --> 00:50:29.280

Stephanie Bogan: Touch it. Oh my god. It was amazing and I am the pickiest writer you will ever meet. So they're good.

347

00:50:30.060 --> 00:50:39.480

Stephanie Bogan: And literally did a call to action summary where it turned the Q AMP a session into like an article white paper type call to action with call outs and cool stuff.

348

00:50:39.780 --> 00:50:48.690

Stephanie Bogan: We had designed and then we send it out as a follow up, and then we'll obviously post it right as an engagement piece. So to get that people have to engage, they have to go

349

00:50:49.020 --> 00:51:03.810

Stephanie Bogan: They have to download it and then there's a waiting list for them to get on. Right. So when they hit that waiting list. They are deep and engagement right on the edge of acquisition. But again, right, depending on who they are in fitness, that they may or may not cross that line.

350

00:51:05.910 --> 00:51:18.450

Tiffany Charles: Yet I think that's great. I call my education, like our trust credits, like we're constantly looking to build those trust credits. And so I think about, like, what are we doing that builds trust credits to get them to engage in a more personal way.

351

00:51:18.750 --> 00:51:22.950

Stephanie Bogan: So, Allison. We're going to rename this category trust equity.

352

00:51:23.400 --> 00:51:25.920

Stephanie Bogan: YEAH TRUST wakeboard and education.

353

00:51:27.150 --> 00:51:27.810

Limitless Adviser: Okay, got it.

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00:51:29.160 --> 00:51:31.860

Stephanie Bogan: All right, that's the way we do things we improve on the fly. We don't wait till

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00:51:32.610 --> 00:51:33.270

Tiffany Charles: I love it.

356

00:51:33.570 --> 00:51:35.790

Stephanie Bogan: No idea about next year. I can't eat them to say, okay,

357

00:51:36.630 --> 00:51:37.200

Tiffany Charles: I'll stop.

358

00:51:37.560 --> 00:51:51.270

Stephanie Bogan: See what happens when we only have 20 slides in a really boring topic and we get to just really jam about what really makes it work, it actually becomes maybe it's just me because I can't see you. It's gonna be a fun topic. All right. Number seven track and monitor success.

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00:51:52.260 --> 00:51:55.350

Tiffany Charles: Yeah, and I think this hit some of the

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00:51:56.100 --> 00:52:04.890

Tiffany Charles: Some of the questions on like, oh, you started here and moved in. Yeah, like to create systems that work for you. So when I was with a much smaller firm and we didn't have

361

00:52:05.190 --> 00:52:15.870

Tiffany Charles: The on the same budget and time allocation and what that looked like, you know, creating that Alan to like starting with the success shifter, the successor was like mind blowing. The first year.

362

00:52:16.140 --> 00:52:26.280

Tiffany Charles: And just getting clear on my budget and that was shifting and sometimes that was small and and make sure you take into account your, your time because I think that that's really important in your budget.

363

00:52:26.670 --> 00:52:39.090

Tiffany Charles: And then solidify what you're going to do and have, like, what are those. What are those KPIs. Yeah, what is that what is that measurement of success. And then as as you continue to build upon that or

364

00:52:39.750 --> 00:52:48.510

Tiffany Charles: Where our team is is like we have an annual marketing plan. We have a full budget, we know where we're outsourcing. We know where what we're doing in house.

365

00:52:49.110 --> 00:52:59.910

Tiffany Charles: And we're checking it quarterly and and being ready to pivot on pivot or double down on strategies that are working really, really well and I need to have

366

00:53:00.630 --> 00:53:13.140

Tiffany Charles: KPIs for both the firm and then all of our team. So I have individual growth KPIs for everybody on our team for business development. So, and just tracking like how that all comes in.

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00:53:13.980 --> 00:53:18.630

Stephanie Bogan: Yeah, and I believe in the samples success shifter. I haven't looked at one since the beginning of the year.

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00:53:19.140 --> 00:53:33.210

Stephanie Bogan: That you haven't sent me to look at in terms of the template. I think there's a sample with marketing obviously marketing KPIs on there. It really is the all the other tool that we that we give to you and Tiffany mentioned it briefly, is that the practice Benchmarking Tool.

369

00:53:33.450 --> 00:53:33.960

Stephanie Bogan: Is there's

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00:53:34.230 --> 00:53:43.500

Stephanie Bogan: All like all the it for some of you probably more than you need. But for those of you who are larger, in particular, but for anyone tracking all the data that you could possibly want. And then some

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00:53:43.860 --> 00:53:48.780

Stephanie Bogan: And then you can add things that are particular right like Don Iario focuses on Google lawyers.

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00:53:49.140 --> 00:53:57.060

Stephanie Bogan: And right other women in tech so he could start tracking by source Goobers versus other women in tech which will tell him, hey, is this

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00:53:57.420 --> 00:54:08.370

Stephanie Bogan: Sort of expansion of my niche because it's like, it's so women in tech is so concentrated that people are coming to me even outside of Google or like they're just like, oh my god, I need you. So I can work with three companies.

374

00:54:08.790 --> 00:54:15.090

Stephanie Bogan: So that he can see if that sourcing is really working if he needs to shift as messages, a little bit. Or you could just keep doing it the same old way.

375

00:54:15.330 --> 00:54:23.310

Stephanie Bogan: And still be successful. Right. But that's where data will give you that little lift that one, two, or 3% that if you multiply that over two or three data points.

376

00:54:23.640 --> 00:54:29.610

Stephanie Bogan: Will get you a 15 or 20% better results in the same amount of time and then you do that three or four times and

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00:54:29.970 --> 00:54:34.230

Stephanie Bogan: Right, you get the Tiffany's and the Taylor's and right you get you get these kind of results so

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00:54:34.530 --> 00:54:43.680

Stephanie Bogan: What we're really trying to articulate here is it's not this big sticky complicated process. It really can feel like that it is follow these rules.

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00:54:44.100 --> 00:54:54.180

Stephanie Bogan: Follow the tools and the track that we give you to apply the time and whatever talent you bring to it right, going back to that really conversation about your genius and leveraging your strengths

380

00:54:54.630 --> 00:54:59.430

Stephanie Bogan: And again, if you stick to that consistently, you're going to be, you're going to see your marketing work.

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00:55:00.570 --> 00:55:04.200

Stephanie Bogan: So, my gosh, we're right on time to if we should do this more often.

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00:55:05.370 --> 00:55:06.540

Stephanie Bogan: Stuff no more than 20

383

00:55:08.100 --> 00:55:16.440

Stephanie Bogan: Little alright so what we wanted to do is really make it your turn. And so the idea here is we've talked for about an hour.

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00:55:16.650 --> 00:55:28.080

Stephanie Bogan: We've answered questions about like what I would consider to be honestly probably our most boring topic in terms of like a marketing plan and how you implement it and KPIs like nothing really sizzle about that.

385

00:55:28.860 --> 00:55:37.710

Stephanie Bogan: But when you when you get the right perspective and enter to shift your thinking around and it really becomes a very exciting topic that's very sexy and it's singles sit in and sizzles because

386

00:55:38.100 --> 00:55:54.570

Stephanie Bogan: It's about creating greater level of success for yourself in less time with greater satisfaction. So this is your opportunity. One more of the things that we're playing with as we come into quarter forward, I would like each of you to pick one of the seven areas.

387

00:55:55.740 --> 00:56:06.720

Stephanie Bogan: That is most relevant to you in terms of going back to that early conversation where you're stuck or struggling right where where you're excited about stepping up but you feel like maybe you could just use a little something.

388

00:56:09.390 --> 00:56:17.400

Stephanie Bogan: All right, and then. So take a minute. Think about what your question is you problem to solve, or ask would be

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00:56:19.050 --> 00:56:28.710

Stephanie Bogan: And then why don't. A few of you pop into the chat, maybe two or three of you and identify this is it. Right, this is what you guys are here for. So don't be shy.

390

00:56:29.130 --> 00:56:42.870

Stephanie Bogan: Identify which number, it is and what your issue, ask or problem to solve, or step up is around it and Tiffany and I will put you in the hot seat in a good way. And we're going to help you through it.

391

00:56:44.340 --> 00:56:46.800

Stephanie Bogan: And we're going to sit here until a couple of you answer so

392

00:56:49.530 --> 00:57:01.410

Stephanie Bogan: You can always tell when we've hit like this, the retreat. I'm like, okay, they're good. I'm going to unleash on and I'm not even going to be. I'm not going to be polite anymore. You guys, there's like 65 of you on the call. Surely one or two of you has a question that's what you're here for

393

00:57:02.460 --> 00:57:13.140

Tiffany Charles: All right, we have some we have Laura, Roger, who says put time in my schedule. We have Dan cedars as turning big into small and we have Patrick who says Create can accountability.

394

00:57:15.210 --> 00:57:16.050

Stephanie Bogan: Awesome. Oh, it helps me

395

00:57:16.230 --> 00:57:16.680

Tiffany Charles: To keep going.

396

00:57:18.360 --> 00:57:19.470

Stephanie Bogan: And zoom the chat down

397

00:57:21.120 --> 00:57:21.660

Tiffany Charles: We have it.

398

00:57:22.200 --> 00:57:23.370

Tiffany Charles: There. Yeah.

399

00:57:23.730 --> 00:57:37.920

Stephanie Bogan: To resume. There's like a a chat in the PowerPoint thing at the bottom. I swear I can only see half the screen specific really good that I can definitely topics. All right. Um, okay. Let's see who was first

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00:57:38.970 --> 00:57:49.080

Stephanie Bogan: Laura rotter put time in my schedule A Laura. I can't see you, can we promote Laura unmute her do whatever special thing we do, Allison, so that we can talk to Laura.

401

00:57:50.610 --> 00:57:51.900

Limitless Adviser: Yes, I think so.

402

00:57:57.150 --> 00:58:00.840

Stephanie Bogan: While he's while out he Ellison is not a heat. My apologies.

403

00:58:01.470 --> 00:58:02.760

Laura Rotter: I am unmuted.

404

00:58:03.330 --> 00:58:03.780

Here.

405

00:58:04.800 --> 00:58:05.640

Stephanie Bogan: How are you

406

00:58:06.270 --> 00:58:08.130

Laura Rotter: Very good, thank you. How are you

407

00:58:08.610 --> 00:58:10.380

Stephanie Bogan: How's that clarity on your niche coming

408

00:58:11.370 --> 00:58:23.850

Laura Rotter: I'm actually getting clearer and clearer and I do have, you know, tasks. I want to do, including it engaging more which we've spoken about on LinkedIn. I just

409

00:58:24.750 --> 00:58:34.410

Laura Rotter: Here, you know, I thought maybe I shouldn't get on this call. I should use this hour and a half to do things. And yet, I'm on the call. I and after this. I have a webinar about

410

00:58:34.980 --> 00:58:42.360

Laura Rotter: Cybersecurity and after that I have a call set up with someone and I feel like every time I look forward at my week

411

00:58:42.810 --> 00:58:49.920

Stephanie Bogan: I totally get it. Tiffany three years ago. We're going to make this really simple, or anybody want to guess what we're going to do here.

412

00:58:52.050 --> 00:58:55.590

Stephanie Bogan: Do you remember what we did in our when we first had the call around the niche, Laura.

413

00:58:57.960 --> 00:58:58.740

Laura Rotter: Remind me

414

00:58:58.980 --> 00:59:01.410

Stephanie Bogan: The pressure that you were putting on yourself to figure it out.

415

00:59:01.920 --> 00:59:02.370

Laura Rotter: Yes.

416

00:59:02.730 --> 00:59:05.100

Stephanie Bogan: What did they ask you to do. Can you share that with everybody.

417

00:59:07.530 --> 00:59:18.630

Laura Rotter: Us several suggestions, the one that stuck with me was journaling and just taking the pressure off myself and let it come get your head that engages with time. Sorry.

418

00:59:18.780 --> 00:59:22.380

Stephanie Bogan: I will. I'm going to, I'm going to explain it. Otherwise, it's gonna be a really bad.

419

00:59:22.410 --> 00:59:22.890

Detroit.

420

00:59:25.980 --> 00:59:27.240

Stephanie Bogan: I've been known to do that on a gig.

421

00:59:29.430 --> 00:59:32.580

Stephanie Bogan: It's because see Anna know just happened. Alright, so

422

00:59:33.780 --> 00:59:48.990

Stephanie Bogan: So let's talk about how we get there, we get there because it's about setting the story that's stuck in you down, which is. Did everybody hear how overwhelmed. Laura is and how much time she clearly does not have to give to the task that she's excited about.

423

00:59:50.430 --> 00:59:58.740

Stephanie Bogan: If I could see you all you could wave and smile. We're gonna have to figure that out because I said I deeply miss seeing you all, all of a sudden, whereas before I didn't mind. Now, I really do.

424

00:59:59.880 --> 01:00:12.540

Stephanie Bogan: Because we don't prioritize our budgets in line with our vision and we can go off into a mindset conversation about stories and all of that. I'm just going to focus on strategies because it applies to most of you, Laura.

425

01:00:13.500 --> 01:00:18.030

Stephanie Bogan: Don't overthink it. And don't overwhelm it and don't overdo it pick three things, a day.

426

01:00:19.860 --> 01:00:28.470

Stephanie Bogan: To move in the direction that you want. If it's write an email a day. Reach out to a client journal for 15 minutes about your next marketing strategy. I don't care.

427

01:00:30.390 --> 01:00:41.520

Laura Rotter: Way that I am doing but but it seems like I want bigger chunks. I'm definitely moving forward and taking steps and making changes that's clear, but not as much as I would like to be doing.

428

01:00:41.790 --> 01:00:49.110

Stephanie Bogan: Right. So here's the really, really, really candid conversation. So we like to call Confessions of a coach and then TIFF, you can jump in on this one.

429

01:00:49.770 --> 01:01:01.470

Stephanie Bogan: There is this thing is everybody read the word if you've read the book Deep work right focus is incredibly important to being effective at what you do. It's hard to focus when you're trying to put 10 pounds of shit and into a five pound bag.

430

01:01:02.640 --> 01:01:08.040

Stephanie Bogan: Really hard to be excellent. And it's almost impossible to be satisfied. Trust me, I know a little bit about this.

431

01:01:08.550 --> 01:01:16.890

Stephanie Bogan: But we all do it, because sometimes circumstances we make choices, whatever it is, what is it, Tiffany and I say you don't always make the right choices you just work hard to make the choices rate.

432

01:01:17.550 --> 01:01:21.630

Stephanie Bogan: Is at the end of the day, it's about how you're prioritizing this

433

01:01:22.110 --> 01:01:34.740

Stephanie Bogan: And sometimes it just means you need deep work time Confessions of a coach. Thank you guys, now I'm like moving my husband's gone I got dogs and cat like I couldn't even make it so it's almost ridiculous and stuff that's happening on daily basis we giggle about it.

434

01:01:36.510 --> 01:01:51.510

Stephanie Bogan: And here we are we doing a random website. What does that require right look at the pages that the copywriters give you not full right but 20 pages of copy and it's your story. It's the combination of your life's work, Laura. How do you feel about sitting down and doing that task.

435

01:01:53.370 --> 01:01:54.120

Laura Rotter: Excited.

436

01:01:54.510 --> 01:01:56.580

Stephanie Bogan: And overwhelmed because hey,

437

01:01:57.360 --> 01:02:03.750

Stephanie Bogan: Yeah, this thing after in this thing after in your brain knows it's going to take hours and hours of deep focus work to get it just right so

438

01:02:04.080 --> 01:02:12.960

Stephanie Bogan: You don't get to it until two in the morning because you're like, wow, this is what it's really going to take to commit the deep work time that I need to feel good about this.

439

01:02:13.920 --> 01:02:26.760

Stephanie Bogan: That's what I did last night that does not happen a lot, but that's what it took. Because of my circumstances like it doesn't mean you know being limitless and having a great mindset does not mean that everything stacks up perfectly every minute of the day.

440

01:02:27.360 --> 01:02:35.520

Stephanie Bogan: It means that you are always moving in the direction of spending more time there and being really aware of what is standing between you and it

441

01:02:36.090 --> 01:02:42.930

Stephanie Bogan: And for me I had to have like I was bound up yesterday. I didn't feel good. I had to sit my kids down and be like, I'm really critical. Right now, I'm sorry.

442

01:02:43.530 --> 01:02:50.880

Stephanie Bogan: Mom is really stuck on this thing and she's not getting it where she wants to and it feels really big and important and I need to set that down. We're just going to hang out.

443

01:02:50.940 --> 01:03:01.920

Stephanie Bogan: And we're going to go to bed, and it's going to all be better tomorrow. Like that's literally what happened in my life. Last night I set my alarm for 2am and he woke up at one and I was so ready to write that time because I knew

444

01:03:03.150 --> 01:03:04.230

Stephanie Bogan: That I was going to get what TIFF

445

01:03:05.940 --> 01:03:07.080

Tiffany Charles: Done like focused

446

01:03:07.320 --> 01:03:13.560

Stephanie Bogan: I needed that focus time Laura. So this is the honest answer which is if you have committed your schedule.

447

01:03:14.040 --> 01:03:24.480

Stephanie Bogan: In advance of your commitment to your marketing vision. They're either you either have to wait. That's the honest answer or you have to commit the time. There's no right or wrong. It's about what's personally okay for you.

448

01:03:25.110 --> 01:03:35.250

Stephanie Bogan: I'm super stoked about what we're doing next year and I was like this is a famous people a lot of money and I really need to get them this stuff so that people actually get the message I want to share in my voice.

449

01:03:35.760 --> 01:03:44.400

Stephanie Bogan: So when I woke up to do it like my brain woke me up an hour early. It was ready to go. I had to give myself that disconnect, because I was stuck in it just wasn't working.

450

01:03:45.030 --> 01:03:55.110

Stephanie Bogan: And I got the clarity of it was about in that case it was a strategy. I didn't have time for deep work. So Laura. That's a long winded way of saying are you giving yourself time for deep work.

451

01:03:56.430 --> 01:04:11.760

Laura Rotter: I'm clearly not and I keep resisting looking forward in my calendar and booking the time and I really need to do that, even if it's like a month from now when I have the time. But book it before other things take over.

452

01:04:12.750 --> 01:04:20.190

Stephanie Bogan: Well, I'm keeping my net feeling that you have about going to the calendar is the underlying procrastination issue because

453

01:04:20.550 --> 01:04:27.900

Stephanie Bogan: A calendar is going to say you don't have the time it's going to make you feel overwhelmed or not doing something that you feel like you need to be doing you therefore failed, and I'm just not going to do it.

454

01:04:31.230 --> 01:04:43.680

Stephanie Bogan: So just going in, even if it is a month from now people and if because that's where your calendar is in reality is least likes to tell me right so down the magical fairy dust. Sometimes and deal with reality.

455

01:04:44.220 --> 01:04:57.840

Stephanie Bogan: Right, I can't make time I can bend reality. But that's as good as it gets. Like sometimes you have to set the magical fairy dust down and look at your marketing plan right to be like, what's it going to take brass knuckles nitty gritty rubber to the road to get this done. I

456

01:04:58.080 --> 01:05:06.990

Stephanie Bogan: Three weeks. Is that ok with me is that it's in service of my goals. Is that a sacrifice, or an investment, how you perceive it matters immensely.

457

01:05:07.650 --> 01:05:18.990

Stephanie Bogan: Or right, am I so committed that I'm going to invest time off hours or capital someone else to get it done no right or wrong answer. Tiff anything you want to add to that.

458

01:05:19.230 --> 01:05:34.200

Tiffany Charles: Yeah, and I, I just feel yeah I when Stephen I met like I had to work down from a 70 hour work week to 40 hours. So talk about like how do I fit what I'm doing. And I'm failing that anyways from 70 hours into 40 and

459

01:05:35.070 --> 01:05:41.520

Tiffany Charles: Then, and then even from that, like, you know, get to get to all of it. And so it took real work to like

460

01:05:41.970 --> 01:05:53.310

Tiffany Charles: When stuff said you don't have a time problem you have a priority problem. It felt like tough love. And it felt. I wanted every excuse in the book, but it's now something, I say to myself because I still

461

01:05:53.640 --> 01:06:01.770

Tiffany Charles: Have moments come up often where I'm like, I don't have the time. And I'm like, well, what, who, you know, like, okay, like if this I say, is really important.

462

01:06:02.220 --> 01:06:13.860

Tiffany Charles: How do I create that time. So I've created the pauses to then understand how am I in this place where this is a priority, and I don't have the time. Sometimes it's mindset. Sometimes it's true, like I need delegation.

463

01:06:14.430 --> 01:06:23.190

Tiffany Charles: Sometimes it's the reality check of, like, okay, like if this is important, you're gonna have to shift. The other thing that I had to learn. And I learned this through my life coach is

464

01:06:24.630 --> 01:06:27.150

Tiffany Charles: My people pleasing really came in. I didn't know how to say no.

465

01:06:28.020 --> 01:06:38.880

Tiffany Charles: Which really caused a problem. So I learned how to have closed communication versus open communication to consistently fill my schedule so that I could say like nicely.

466

01:06:39.720 --> 01:06:48.960

Tiffany Charles: That these outrageous aren't like it's not a priority, like it's not gonna, it's not going to move the needle for so for that reason I'm going to, I'm going to have to say no because otherwise.

467

01:06:49.320 --> 01:07:00.930

Tiffany Charles: The cost of that is me being present with my kids at night or the cost of that is me being able to deliver on something very like a priority. So I started looking at those trade offs.

468

01:07:01.530 --> 01:07:14.160

Tiffany Charles: And realizing, like, you know, for instance, like cyber security. I'm like man like that probably could wait two months or like I could put this in and and I went to this, I went to a place of like

469

01:07:14.490 --> 01:07:20.280

Tiffany Charles: I'm going to look at this week and I'm going to reschedule meetings or I'm going to cancel ones and that hurts more than saying no.

470

01:07:20.850 --> 01:07:34.410

Tiffany Charles: But it was a painful lesson to get control of my calendar so I feel you. I think that there's what you're at is a place to pause and really look into what are your priorities and then align your calendar and what feels best to you.

471

01:07:35.580 --> 01:07:36.390

Stephanie Bogan: Yeah, if

472

01:07:37.620 --> 01:07:50.550

Stephanie Bogan: We have time at the end of the call, because we've got a couple more questions. I want to get to where I'll remind me to tell you all the the senator and the budget story. You don't remember that one. All right. Um, let's see. Pat Darby I think had a question, Pat, or you can we make pat live

473

01:07:52.470 --> 01:07:58.500

Stephanie Bogan: Oh, good, thanks. Tammy. We're trying new stuff. So you guys got to tell us what you like or don't like it's totally okay if you don't like stuff. It won't hurt my feelings.

474

01:07:59.670 --> 01:08:15.600

Patrick Darby: Hell to go and I don't have a question. I was just saying that the accountability is definitely my problem I have know what I should do and it's basically cold prospecting and I just find a lot of excuses to push push to the end of the day, and then roll it to the next day and so forth.

475

01:08:16.770 --> 01:08:17.190

Patrick Darby: So,

476

01:08:18.780 --> 01:08:22.350

Stephanie Bogan: What's your biggest excuse justification or rationalization.

477

01:08:27.090 --> 01:08:29.850

Patrick Darby: Justification is probably I'll do it later.

478

01:08:31.950 --> 01:08:33.030

Stephanie Bogan: Why will you do it later.

479

01:08:36.630 --> 01:08:48.000

Patrick Darby: I'll usually think all I need to, it's all, it's all mindset, like I just don't want to really deal with the rejection of cold prospecting. Okay, so I'm excuses to push it off.

480

01:08:48.210 --> 01:08:50.970

Stephanie Bogan: Is the rejection of cold calling and fill in the blank.

481

01:08:53.010 --> 01:08:53.610

Patrick Darby: I'm

482

01:08:54.810 --> 01:08:55.440

Patrick Darby: Sitting on

483

01:08:56.070 --> 01:08:57.810

Stephanie Bogan: The rejection of cold calling

484

01:08:58.830 --> 01:09:02.010

Stephanie Bogan: Feels what fill in the blank. Like, what about it. D. Are you avoiding

485

01:09:03.480 --> 01:09:04.290

Stephanie Bogan: Feeling wise.

486
01:09:05.100 --> 01:09:05.610
I'm

487
01:09:07.140 --> 01:09:11.340
Patrick Darby: Feeling. I don't know if I could think of one. I guess just any sort of

488
01:09:12.510 --> 01:09:14.610
Stephanie Bogan: Pick the most uncomfortable, one that comes to mind.

489
01:09:17.730 --> 01:09:19.680
Patrick Darby: Just of rejection UP, BUT I GUESS.

490
01:09:20.010 --> 01:09:28.350
Stephanie Bogan: Does anyone here I get when you put yourself out there and you're like I great stuff for you. I'm going to personally guide you and they're like, No, no thanks. Don't even get your

491
01:09:29.580 --> 01:09:38.190
Stephanie Bogan: stakes in the heart. Right. Like, you don't understand. I, I care more than that guy down the street. Your brother's own go like, Oh my God, what are you doing, I have to save you from yourself. Right.

492
01:09:38.910 --> 01:09:48.000
Stephanie Bogan: Or it's just like, oh. They're onto me. Right. I really do. I'm not graded this. I'm not a blank enough and none of it's true, by the way, right, if it were you would have figured it out by now.

493
01:09:48.660 --> 01:10:00.690
Stephanie Bogan: Right. What it is, is the feeling I just talked to on tailored for advisor growth community. And this is what came up in one of those stress the strings after the fact. For some of those are the replay. She was like, Oh, that's great. What about that procrastination thing.

494
01:10:01.320 --> 01:10:06.030
Stephanie Bogan: You're never avoiding the task, you're avoiding the meaning that you give the task.

495
01:10:06.480 --> 01:10:18.810
Stephanie Bogan: Which is in this case rejection, which, by the way, may or may not actually bother you. It may be that that rejection means, you know, I don't get my plan. I don't have my plan goals and that means something bigger to me.

496
01:10:19.290 --> 01:10:27.180
Stephanie Bogan: So when you think about like when you think about talking to 100 people in 99 of them saying, know what comes up for you.

497
01:10:32.130 --> 01:10:34.320
Patrick Darby: What comes up when I actually get the know

498
01:10:34.710 --> 01:10:35.880
Stephanie Bogan: Like, why do you care.

499

01:10:35.970 --> 01:10:46.410

Patrick Darby: Know, ironically, getting to know hurts less than that then actually like wanting to do it, you know, and I don't know if that makes sense. Like you know in sports you like

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01:10:47.640 --> 01:10:51.180

Patrick Darby: Things get better have to get the first hit right um

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01:10:51.270 --> 01:10:58.980

Patrick Darby: Well yeah actually doing it is harder than when they say now that I'm like okay, I get that. That actually bothers me less than in my head. It will

502

01:10:59.190 --> 01:11:00.570

Stephanie Bogan: So it's the starting part

503

01:11:01.080 --> 01:11:01.470

Patrick Darby: Yeah.

504

01:11:01.920 --> 01:11:09.570

Stephanie Bogan: Yeah, so I see you around writing. I don't know what it is, once they start it's fine and flows and I'll look, I've got four hours went by and took me an hour to start

505

01:11:10.890 --> 01:11:28.080

Stephanie Bogan: Truly, so one is great, some things are not what I'll call, will you have to get into the deep work zone to do them. So when you think about the task of calling people what zone. Do you need to be in when you do it and you feel good about it. What zone are you in

506

01:11:31.380 --> 01:11:37.890

Patrick Darby: Usually I'm just forcing myself that that was one of the questions that do on the Community before about what to do it because I know

507

01:11:38.130 --> 01:11:48.510

Patrick Darby: I should be ready to do it first, like revenue producing. And when I have the most energy, but it's so draining that then I'm like, I don't want to really do much else after like an hour to have

508

01:11:49.350 --> 01:11:55.080

Patrick Darby: Either getting beaten up in the prospecting or beating myself up thinking about prospecting right

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01:11:55.440 --> 01:12:01.110

Stephanie Bogan: So here, those two stories will at least one story in there. Right. I just heard getting beat up by prospecting

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01:12:03.210 --> 01:12:10.170

Stephanie Bogan: Are you ever going to feel energy positive about prospecting if the story you have around it is you're going to get beat up by it.

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01:12:12.150 --> 01:12:12.960

That's a good point.

512

01:12:15.360 --> 01:12:17.700

Stephanie Bogan: You might be better than me, but it usually doesn't work for me.

513

01:12:18.990 --> 01:12:28.530

Stephanie Bogan: So when you start anything with. I can't, I don't want to. I don't know how it will work. Your brains like yep you shouldn't even bother. I believe you actually because you know stuff.

514

01:12:29.250 --> 01:12:37.170

Stephanie Bogan: Your brain believes pretty much what you tell it. And so, in the absence of telling you, good things that relies on the stories and our job is to tell it better stories.

515

01:12:38.130 --> 01:12:47.040

Stephanie Bogan: Does that make sense so we can talk a lot of strategy around procrastination. But what I hear you saying is there's a story there that you just want to reframe

516

01:12:47.430 --> 01:12:52.650

Stephanie Bogan: And figure out what the success stories like prospecting in of itself. Sounds sucky. I'm going to call people

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01:12:52.860 --> 01:12:58.830

Stephanie Bogan: I'm going to be a cheeky salesperson. They're going to reject me or you could reframe it and say, I'm actually

518

01:12:59.040 --> 01:13:08.430

Stephanie Bogan: The trusted advisor that people really need to find and people in fitness need finance as much as anyone. And I want to bring the person that brings them deep value to them. And in order to do that.

519

01:13:09.180 --> 01:13:15.300

Stephanie Bogan: Based on my current strategy, which I chose the best path is to call 100 people and find the three that will say yes.

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01:13:15.930 --> 01:13:22.020

Stephanie Bogan: If you hate it, like literally get to a point where, like, I really just don't like this week, then you need to find another strategy.

521

01:13:22.620 --> 01:13:34.980

Stephanie Bogan: But identify first the story because what happens a lot of times, ladies and gentlemen, is that you will check the strategy because it doesn't work, or you don't get to where you do it halfway when it was a story that was sabotaging the strategy in the first place.

522

01:13:36.180 --> 01:13:36.840

Stephanie Bogan: Does that make sense.

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01:13:38.130 --> 01:13:39.420

Patrick Darby: Yes, it does. Thank you.

524

01:13:39.750 --> 01:13:48.180

Stephanie Bogan: So your next step is to figure out what the right journal paid or do something reframe that story. And if you can't get to it relatively quickly reach out and let's do the work there.

525

01:13:49.260 --> 01:13:50.730
Patrick Darby: Okay, thank you. Right.

526
01:13:52.620 --> 01:13:56.190
Stephanie Bogan: Okay, Tim. Let's see who's next. I'm gonna let you Lori.

527
01:13:58.290 --> 01:13:58.950
Stephanie Bogan: Are you there.

528
01:14:02.010 --> 01:14:03.420
Lorri DeFoor: I'm here. Can you hear me.

529
01:14:03.720 --> 01:14:05.250
Stephanie Bogan: I'm great. How are you today.

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01:14:05.760 --> 01:14:06.960
Lorri DeFoor: I'm doing well.

531
01:14:07.440 --> 01:14:10.200
Stephanie Bogan: What question do you have for us which number lisa where to go.

532
01:14:10.230 --> 01:14:11.610
Lorri DeFoor: I said, number two.

533
01:14:12.930 --> 01:14:18.090
Lorri DeFoor: And like I said, I think if I'm understanding this right. I think it's number two that I need. I think one of the things that for me.

534
01:14:20.070 --> 01:14:29.820
Lorri DeFoor: Was a big aha moment. And what we were talking about is, is this question about what part of this. Are you really good at and what part of this. Are you not really good and I am not.

535
01:14:31.320 --> 01:14:40.740
Lorri DeFoor: Not really good at some of the stuff that's actually super easy to outsource and I've just been dragging my feet on outsourcing it right like I am not good at the processes and the social media and then

536
01:14:41.880 --> 01:14:50.310
Lorri DeFoor: I just don't do it. And that's actually stuff that's not hard to outsource I just have been dragging my feet about doing it and

537
01:14:51.540 --> 01:15:01.200
Lorri DeFoor: My goal right now my plan right now is not actually to start marketing until 2021 I really want to get my sort of systems and everything else kind of cleaned up and in place through the rest of this year, but

538
01:15:01.710 --> 01:15:05.400
Lorri DeFoor: One of the things that for me, I think, was a big takeaway is if I've tried

539
01:15:05.970 --> 01:15:19.890

Lorri DeFoor: Four or five times and I've only been in business, three years and I've tried four or five times to get myself on a consistent schedule of like making Facebook post or doing these things. And I always don't do it. I probably need to find somebody else.

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01:15:21.060 --> 01:15:30.300

Lorri DeFoor: To do it for me. Like, that's not a hard thing to find somebody else to do for me. And so it's not really a question so much as I think it was just a realization that I had in listening to this.

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01:15:32.640 --> 01:15:37.860

Tiffany Charles: And so what is the resistance to hiring somebody like Why haven't you

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01:15:38.190 --> 01:15:42.900

Lorri DeFoor: I think so. I'm a pretty small company still. And so I haven't hired anyone to do anything.

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01:15:45.120 --> 01:15:54.600

Lorri DeFoor: So that the resistance, I think, is, in part, I'm actually financially kind of feeling for the first time, like it's actually feasible to hire somebody to do it. Okay, and

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01:15:55.020 --> 01:16:01.230

Lorri DeFoor: Um, but the resistance part of it for me is just, I don't even really know how to do that because I've never done that before so

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01:16:01.770 --> 01:16:03.690

Tiffany Charles: First time delegation like

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01:16:07.020 --> 01:16:17.610

Tiffany Charles: I see that. And then, um, I, I also, I think, we certainly want to hit like taking your team and first time delegation, but something I also heard when you were speaking was I'm moving it to

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01:16:18.300 --> 01:16:27.900

Tiffany Charles: Next year, because I'm going to get my systems and processes in place which I would agree, like systems and processes certainly help so I like

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01:16:28.590 --> 01:16:37.230

Tiffany Charles: You don't want to throw spaghetti at the wall and and just keep things going. Like having that in places important. However, I also heard you say it's been a few years and

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01:16:37.770 --> 01:16:51.120

Tiffany Charles: You keep not putting it in place. And so I want to caution you to just make sure that you are holding yourself accountable to starting that in the year and that that doesn't become a trend and

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01:16:51.570 --> 01:16:54.330

Lorri DeFoor: Oh yeah, so the one of the reasons that I am right now putting

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01:16:54.330 --> 01:17:01.320

Lorri DeFoor: It off till next year is I currently am at the point where, like, I don't actually want any more business in 2020

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01:17:02.040 --> 01:17:07.830

Lorri DeFoor: Congratulate. And that doesn't mean I have like a massive amount of business. It just means like what I have going on right now.

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01:17:08.790 --> 01:17:18.930

Lorri DeFoor: It feels like I can't manage it unless I get the other stuff in place. And so I don't really want to start pushing anything in the direction of more until I know that I can handle more

554

01:17:19.620 --> 01:17:28.200

Lorri DeFoor: In a way that does you know is has a lot of integrity to it. So that's, that's the bigger driver here for me to to push it off, but I do appreciate

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01:17:30.450 --> 01:17:39.360

Lorri DeFoor: I appreciate that. That sort of notion and paying attention to that because I do understand this, this is an issue for me. Yeah.

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01:17:39.690 --> 01:17:41.070

Lorri DeFoor: Yeah, thank you for saying that.

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01:17:41.100 --> 01:17:43.740

Tiffany Charles: Yeah, if you got it step to do something to add.

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01:17:44.040 --> 01:17:54.720

Stephanie Bogan: I say look delegating is with especially for the first time, but look for, for most of us, it's not the for some people it's ridiculously easy for anyone with a remote perfectionist tendencies, it is not

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01:17:55.740 --> 01:18:01.860

Stephanie Bogan: Until you get good at it and realize it's just about finding the right people, which becomes the new source of frustration.

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01:18:02.160 --> 01:18:09.510

Stephanie Bogan: Because you know that they exist. You just have to go find the unicorns, which we are really always in tune to helping you guys were so that you don't have to do as much of that work.

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01:18:10.560 --> 01:18:20.370

Stephanie Bogan: But it's almost always going to be at people, or if it's not a story which again, you guys should at least be armed with enough to really ask yourself those questions at this point, if not even do more than that.

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01:18:20.940 --> 01:18:35.010

Stephanie Bogan: And to it's then it's usually a priority or people problem, right. I haven't prioritized it or I haven't put the people process, whatever it is in place, but usually it's people are priority because that's kind of what it takes to make something happen and then you get to the detail problems.

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01:18:36.300 --> 01:18:41.010

Stephanie Bogan: Right. I think we have. We had a question from Dan on number one Danny there.

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01:18:46.380 --> 01:18:48.000

I see Dan's name popping up.

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01:18:49.740 --> 01:18:50.460

Dan Suiter: And

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01:18:50.700 --> 01:18:59.340

Stephanie Bogan: Hey, give me one second. Dan, I see of course some questions from done and Christine and Matt just around the details of nitty gritty bolts of marketing process KPIs.

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01:19:00.300 --> 01:19:05.490

Stephanie Bogan: Do you guys feel like we answered those. I just didn't know those came in after we had that conversation. I just, if they do, we can

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01:19:05.550 --> 01:19:15.240

Stephanie Bogan: If they didn't drop a note in the chat, we'll make sure we save a couple minutes for those. I want to make sure they're good question. So make sure we covered them in the way that you wanted. All right, Dan, what do you got for us the number one.

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01:19:16.710 --> 01:19:22.950

Dan Suiter: It's, it's my go to issue all the time. It's breaking the big things down into little clip where do you start so

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01:19:23.220 --> 01:19:32.340

Dan Suiter: I mean, I guess one step. I've done instead of trying to do it myself. At this point, I am engaged with snappy cracking to get something started so I have a call with them later on with our situation but

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01:19:33.150 --> 01:19:40.320

Dan Suiter: With making the plan just how do you break down this I have this machine, which is the first part, I put together.

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01:19:43.350 --> 01:19:48.540

Dan Suiter: So, so making the concept real. Does that make sense yeah that's that's that's pretty much it.

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01:19:49.050 --> 01:19:51.210

Stephanie Bogan: So do you have your one page marketing plan.

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01:19:52.230 --> 01:19:59.940

Stephanie Bogan: Somewhere. Okay, so the first thing you're going to do to make it realize you're going to take it out. You're going to sit it on your desk and it's going to live there and you're going to look at it every day.

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01:20:01.380 --> 01:20:08.160

Stephanie Bogan: Literally, looking at something every day embedded in your brain makes it part of your conscious and starts to make it part of your

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01:20:08.460 --> 01:20:18.900

Stephanie Bogan: The forefront of your awareness right part of your focus, which is ultimately what it takes to make things happen. So step one is. That's why we make in one page plan if you're doing your marketing tracking via success shifter.

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01:20:19.560 --> 01:20:31.260

Stephanie Bogan: I like to do it on paper again because you can see it. So again, CRM and all that, if you've got a task management system and a flow there is really great if you don't use something like the success shifter or something similar.

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01:20:32.010 --> 01:20:41.910

Stephanie Bogan: But, but can you pick something aside from obviously email snappy cracking because they have a process but pick something that you want to turn right break into from big to small and Tiffany And I'll help you do it.

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01:20:50.040 --> 01:20:52.470

Dan Suiter: Yeah, I'm feeling, feeling the deer in the headlights there. I

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01:20:52.950 --> 01:21:02.490

Dan Suiter: Um, I have ideas I guess like of what to go through like I really like the ideas of the podcast I have a market. I think that would be very susceptible to that are receiving that should I say

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01:21:03.150 --> 01:21:11.940

Dan Suiter: Like so. And I've listened to Adam and Brad and Taylor lunch. It's just kind of like where where to begin, for someone with nothing.

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01:21:12.360 --> 01:21:18.810

Stephanie Bogan: Great. You know, there are many of them are on the call to so that's always a plus I see Adam check typing ways he always does. So

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01:21:19.050 --> 01:21:27.720

Stephanie Bogan: Let's break it down, down. So this is the this is where most of us will get stuck. A lot of the time, like, Oh, I've got this great idea. Mm hmm. The giant bullied. It can't step into it.

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01:21:28.650 --> 01:21:40.620

Stephanie Bogan: The secret here. Tim knows is take a step literally any step. But let's break this stuff is break it down. So Dan, your goal is to, let's say, for purposes example, start a podcast that correct

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01:21:42.870 --> 01:21:58.080

Stephanie Bogan: Yeah, okay. So what is step one. Anybody want to drive them to lead this is going to be a team participations for we have a chat box. Step one. When you've decided gave if you're on you decide you want to start a podcast. What is step one, break it down. How many out of your guys and gals.

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01:22:03.690 --> 01:22:18.840

Stephanie Bogan: She remembered to scroll down. So if your tech great Tammy. So what is. Who's your tech to remember people process platform and partners so process right tech partners would be who's going to help you with your podcast, because it's generally not something you do alone right

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01:22:21.630 --> 01:22:22.020

Stephanie Bogan: In

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01:22:23.940 --> 01:22:24.450

Stephanie Bogan: Either

589

01:22:25.140 --> 01:22:28.530

Dan Suiter: Sorry I keep I have my own mute button. Everyone's safety.

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01:22:29.790 --> 01:22:39.000

Stephanie Bogan: So step one is identify your partners. So in order to do a podcast you there are people that help you, Adam, are you on Taylor been

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01:22:39.960 --> 01:22:46.050

Stephanie Bogan: There, they're going to give you, right, there's some vendors on our resource list, right. So step one is find a partner. There are some good ones here.

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01:22:46.380 --> 01:22:56.640

Stephanie Bogan: That I would highly recommend you just use one of the ones that they're using, and they'll do good work and you can be really, really, you can be very reliant. So here, Benson call Steve Stewart. I know Adams got one.

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01:22:57.270 --> 01:23:04.110

Stephanie Bogan: He gave me that reference. So step one is figure out who your podcast partner vendor, whatever you want to call them to who they are.

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01:23:06.390 --> 01:23:09.540

Stephanie Bogan: Step. We're not done, Dan. You're not getting off that easy. What step to

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01:23:10.320 --> 01:23:13.620

Dan Suiter: That was just the thanks for that comment. I try to be, you know, individual when I can.

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01:23:14.580 --> 01:23:20.130

Stephanie Bogan: Alright. So step two is we've got our partner, Adam, what do we have to do next. Ben me out here, Ben.

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01:23:21.960 --> 01:23:25.110

Stephanie Bogan: I'm not stumped by the way I'm really just trying to get you all engaged. Like, I don't know.

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01:23:26.970 --> 01:23:28.380

Tiffany Charles: tenafly what you're gonna

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01:23:28.830 --> 01:23:34.380

Tiffany Charles: Have like what you're going to speak about identify your brand or your focus

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01:23:34.620 --> 01:23:36.390

Stephanie Bogan: We obviously do need to break this down. Right.

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01:23:36.420 --> 01:23:36.930

Tiffany Charles: Like yeah

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01:23:37.800 --> 01:23:51.210

Stephanie Bogan: So obviously, step zero is who is your audience. What is your message. What is your title. Right. Like, I'm assuming, right, but it really is ground zero. Step one is then find the partner who's going to give that voice and outreach out into the world.

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01:23:52.020 --> 01:23:58.530

Stephanie Bogan: Of three is build whatever processes you need with the vendor and within your people process platform.

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01:23:59.790 --> 01:24:16.350

Stephanie Bogan: Right. So if you're, if you have a success shift during nothing else right it's record one podcast a week you know do XYZ, whatever those tasks are you have a team right delegated so it's literally follow that process step one, step two, step three. Step four. Step five.

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01:24:20.640 --> 01:24:28.020

Stephanie Bogan: Ben, let's unmute Ben, I just noticed. Let's unmute Ben and then he'll actually just quickly walk you through the actual. Here you go. He's going to tell you right now, but we're going to unmute you.

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01:24:28.470 --> 01:24:29.940

Benjamin Brandt: Yes, I'm here. Yeah.

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01:24:31.860 --> 01:24:34.440

Benjamin Brandt: You have to repeat the question. It was on I was also wonderful called same time

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01:24:34.830 --> 01:24:39.720

Stephanie Bogan: You're gonna be way faster than chat so I'm just gonna let you dive in, because I want to make sure, Dan, and everybody gets the nitty gritty quick

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01:24:40.200 --> 01:24:43.050

Benjamin Brandt: Okay, let's repeat the question, though, because I was also on a phone call.

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01:24:43.380 --> 01:24:57.060

Stephanie Bogan: Okay. So step one is turn big strategies into small tasks and with Dan we have chosen a podcast. So we have rate we know we have to get our message or title and our audience. We know that we have to get our podcast partner, like who's going to do it in your case you recommended Steve.

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01:24:57.450 --> 01:24:57.720

Benjamin Brandt: Yep.

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01:24:58.110 --> 01:25:00.120

Stephanie Bogan: Now what is Dan do help me break it down for him.

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01:25:01.440 --> 01:25:08.820

Benjamin Brandt: Well, I think, is properly set your expectations. Right. I mean, you're not going to get clients calling you after the fifth episode. So make sure that you're in love with the

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01:25:09.810 --> 01:25:17.970

Benjamin Brandt: Process and you're getting some fulfillment from just putting your knowledge out into the world because your audience will hear it if it's not authentic that you're legitimately enjoying teaching people

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01:25:18.570 --> 01:25:28.860

Benjamin Brandt: So don't publish episode number one, unless you're willing to publish episode 100. So I would say record three episodes into your phone. I think I gave the same advice to Kathy, not, not too terribly long ago.

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01:25:29.880 --> 01:25:42.630

Benjamin Brandt: And just evaluate how you felt about the process so it won't cost anything. You don't need to make any, you know, big commitments just record three episodes into your phone and just evaluate how that made you feel you know even if no one ever calls you. Could you do that 100 times

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01:25:43.680 --> 01:25:51.480

Benjamin Brandt: And then that'll that'll give you feedback to give you should go further and spend money and buy technology and women, all that kind of stuff.

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01:25:52.350 --> 01:25:55.920

Stephanie Bogan: Yeah. And literally, you just get to a point. This is a great thing to post on community or

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01:25:56.460 --> 01:26:03.060

Stephanie Bogan: Can have mentioned gave Nelson because I he did a phenomenal job of just being like, I'm going to go do it. And then I will figure it out.

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01:26:03.780 --> 01:26:11.250

Stephanie Bogan: Which is really the secret, but to Tiffany's point, pick your first five or in between, pick your first five or 10 topics, you know, three to five.

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01:26:11.640 --> 01:26:20.160

Stephanie Bogan: Pick you get your guests and then just record them. And this is how I right when I feel stuck, which is recorded them for the trashcan like don't even feel like you have to put them out in the world yet.

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01:26:20.760 --> 01:26:27.060

Stephanie Bogan: Record them as the same advice that I gave gave or you went and recorded and we recorded more you recorded more and then he just got on fire.

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01:26:28.320 --> 01:26:32.550

Benjamin Brandt: What it makes me think about something that Tiffany said on Michael kids is this podcast.

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01:26:32.910 --> 01:26:39.030

Benjamin Brandt: You want it, you want to measure your actions don't don't measure the results right away, like you put out three episodes and nobody calls and so you quit.

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01:26:39.330 --> 01:26:49.020

Benjamin Brandt: Which is like what 80% of all podcasters. Do you know measure, measure your actions, you know, is anybody list. Is anybody visiting my website. Is anybody downloading the show anybody reach

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01:26:49.770 --> 01:26:57.660

Benjamin Brandt: You know, for listener questions are people mentioned in the in the media, you know, measure those sort of things, not just get. I get a client, because sometimes that takes a long time.

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01:26:58.110 --> 01:27:05.250

Stephanie Bogan: I like to say marketing is immediate and its application, not always in its results right like you have to just keep playing it.

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01:27:06.180 --> 01:27:07.650

Benjamin Brandt: Keep writing. Yep.

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01:27:07.710 --> 01:27:08.910

Stephanie Bogan: Dan. Does that help you

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01:27:11.400 --> 01:27:12.840

Dan Suiter: Oh yeah, yeah, that's helpful.

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01:27:13.860 --> 01:27:21.720

Stephanie Bogan: So the idea there. Do you see how like at any point you can go on community. You can Google how to start a podcast. Right. And literally, there'll be 15 steps.

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01:27:21.990 --> 01:27:28.380

Stephanie Bogan: It's almost never getting the information or the advice. It's creating it's figuring out how to fill the gap.

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01:27:28.860 --> 01:27:43.770

Stephanie Bogan: The space between you and the information or advice, right, whether it's a priority problem of procrastination pop problem of people problem, a process problem, hopefully what we've talked with you guys about today will give you a lot more insight into how you can more effectively implement

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01:27:44.910 --> 01:27:48.090

Stephanie Bogan: We're going to answer a couple of those Q AMP a questions. For those of you that are still on.

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01:27:48.390 --> 01:27:59.970

Stephanie Bogan: But in terms of the in practice. I am not going to read all this because there's just a wealth of resources here. Don't feel overwhelmed by the long list. Just know that it's rate bite sized chunks, step one, step two and. Step three.

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01:28:00.480 --> 01:28:10.170

Stephanie Bogan: And obviously Q AMP. A as usual. So, Christy what soft wanted to know what software do you recommend for advisors to track time throughout the day. And what are they spending time on

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01:28:10.680 --> 01:28:16.020

Stephanie Bogan: There's a time tracking app Allison might know the name of it that we use when we do them because we do them periodically.

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01:28:16.380 --> 01:28:21.060

Stephanie Bogan: A sauna, which is that project management software we use. I think the others do it as well.

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01:28:21.660 --> 01:28:26.520

Stephanie Bogan: He tracks time around tasks. I don't do it for all times, but I have started doing it for marketing.

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01:28:26.910 --> 01:28:37.500

Stephanie Bogan: In particular around deep work because I will, and all kinds of deep work because I want to track how much time. I'm actually spending doing that versus run the shop tasks, Tiffany, you want to add anything to that.

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01:28:38.670 --> 01:28:41.730

Tiffany Charles: Nope, I guess I do it a little bit more old school and I

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01:28:42.390 --> 01:28:58.050

Tiffany Charles: I take time. Every Friday to reflect on my calendar of like how I just spent my time for the last week and then I take time to look at my calendar in the next week and I have here that to my goal calendar and so that's how I do it. But

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01:28:59.520 --> 01:29:01.710

Tiffany Charles: Yeah, I love the idea of having a tracker.

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01:29:02.370 --> 01:29:08.640

Stephanie Bogan: Yeah, we started using a slide. The most effective way that I've used to get people to track time consistently that they don't hate

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01:29:09.420 --> 01:29:11.490

Stephanie Bogan: You guys are gonna laugh when I say it is the success shifter.

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01:29:11.700 --> 01:29:24.960

Stephanie Bogan: Like literally you can create a category called time management and then the things you want to track time around, right, deep work on marketing, right, time spent on management. What, whatever it is. And literally, you put point five per day. Point two 5.5

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01:29:25.590 --> 01:29:33.360

Stephanie Bogan: You can get a really simple view of your time tracking apps are obviously way cooler. And they trap you and all that, but it's a really good way in real time to keep track

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01:29:34.170 --> 01:29:46.980

Stephanie Bogan: Don had the question regarding performance tracking and this is similar to Matt's question. So let's tack rub them together is, is that a myth that the larger scale your outreach is that the lows, that the close rate will adjust downward

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01:29:48.540 --> 01:29:56.160

Stephanie Bogan: So don't I'll answer this one. Ben, you can jump in around podcast, I'm going to say yes and no one of those great ambiguous, the answers.

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01:29:57.390 --> 01:30:07.800

Stephanie Bogan: For you are in the process right for outreach to people who who take a call to action. Yes, the numbers to an extent well they'll level out but they're thresholds, just like everything else.

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01:30:08.310 --> 01:30:20.340

Stephanie Bogan: But once you get to the point where they engage with you, right, they've reached out and said, I want to schedule a call that showed and like that should always consistently be 80% or better and had that conversation right also shouldn't be too high.

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01:30:21.450 --> 01:30:34.290

Stephanie Bogan: So Don, you're going to want to look at your channel going back to that earlier conversation in the metrics and look at what they are relative to the specific activity that you're doing so that you're using best practices as a starting point and then you're starting point as a baseline.

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01:30:37.110 --> 01:30:45.930

Stephanie Bogan: Matt has a question. I think if I want you to answer this one. Can you walk through a specific example and explain how you do your process, how much time it takes your KPIs how you track it.

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01:30:46.980 --> 01:30:50.940

Stephanie Bogan: When you see a license. So, the less obvious one, in terms of automation and

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01:30:51.690 --> 01:31:01.710

Tiffany Charles: Yeah, so for, for example, for COI so I do it this way. I have my first one is, um, what

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01:31:02.850 --> 01:31:12.360

Tiffany Charles: What's my strategy. So what am I going to focus my time on. So that's where I start SEO wise is the channel. What is my strategy. So almost like the one page financial plan.

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01:31:12.660 --> 01:31:19.920

Tiffany Charles: What is my strategy here. Okay. My strategy is this. This is how I'm going to tackle this great. What's my cost. I do that on

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01:31:20.130 --> 01:31:28.740

Tiffany Charles: How many hours. Am I going to spend and I put an hourly rate to that. And then I put the actual capital or cash flow investment that I'm going to put into it.

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01:31:29.100 --> 01:31:41.160

Tiffany Charles: And I total that. So for my COI this year. It's going to be a \$45,000 commitment right and then the next piece I looked at is how do I get my ROI and what would I

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01:31:41.460 --> 01:31:50.490

Tiffany Charles: What are my measurements of success. So my measurements of success are from the ROI or from the center of influence that I have committed

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01:31:50.820 --> 01:31:58.080

Tiffany Charles: I want one referral from each one of them from the ones that are actual influencers for me. I want three referrals from them.

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01:31:58.620 --> 01:32:06.660

Tiffany Charles: Um, and I also and then like I also do my measurements of success. Like, what are my soft measurements of success. I have the five

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01:32:07.350 --> 01:32:12.240

Tiffany Charles: Step referral campaign or in place and I'm we're utilizing that efficiently.

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01:32:13.050 --> 01:32:26.700

Tiffany Charles: I am setting up a mastermind because right now I'm spending my time with five of these SEO wise independently and that would really create the efficiency and bring down my cost and up my ROI a bit on that. So like I do a little bit of that and then

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01:32:28.170 --> 01:32:40.350

Tiffany Charles: And then I use truthfully. I'm using an Excel or have a Google Slides sheet to create that strategy and then as far as the

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01:32:41.010 --> 01:32:54.360

Tiffany Charles: The measurements of success. I tend to build that out into our CRM juncture. Right. So the five step referral process is a workflow. So the moment somebody named gets hit as a referral. Like that's kicked into place.

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01:32:55.800 --> 01:33:10.680

Tiffany Charles: And so I think that's it. And then like their, their name as soon as it's inserted into junctures automatically tied to the COI list that's in our constant contact. So I know that they'll start getting those campaigns. So those are the types of things are in place. Did that help

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01:33:13.050 --> 01:33:13.890

Stephanie Bogan: I thought was really

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01:33:14.010 --> 01:33:16.620

Tiffany Charles: Good that into the question I he's not on to answer that.

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01:33:18.030 --> 01:33:32.100

Tiffany Charles: I can't hear you but I'm hoping that's what you were asking for. But I think, yeah, set your strategy. Know your cost set, what would be successful. And then you're making your plan and like what are your activities to get you there. So,

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01:33:33.150 --> 01:33:41.670

Tiffany Charles: Well, I have the five step referral, but I don't do it consistently. Okay. How are you going to do that consistently one step at a time. Who do you delegate that to how do you build it into your system.

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01:33:42.330 --> 01:33:51.960

Stephanie Bogan: Yeah. And I was actually I got really excited because as Tiffany was saying it, I was like, oh, I realized it didn't have time. It doesn't matter. But I was literally before this call, doing my prep for the day this morning.

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01:33:52.290 --> 01:33:57.390

Stephanie Bogan: And on that is a call with Tiffany later today to review their marketing plan. And I was like, she's telling the truth.

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01:33:58.440 --> 01:34:04.650

Stephanie Bogan: She's got her time is 35 that cuz she literally has the whole thing mapped out. It literally is a Google Sheet doc with columns that she created

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01:34:05.010 --> 01:34:13.230

Stephanie Bogan: It doesn't have to be like some big fancy thing. I mean, most marketing that's done really well, can be done and tracked on the back of a napkin and simple succession after like truly

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01:34:13.650 --> 01:34:24.720

Stephanie Bogan: The rest of it is just efficiency honing your craft automation and leverage. Right. So step one, put a simple structure in place, pick a few simple strategies get sticky about them.

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01:34:25.620 --> 01:34:34.890

Stephanie Bogan: If you work the plan consistently over time. The plan will work. It will drive growth, which is the goal. So I want to thank Tiffany

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01:34:35.370 --> 01:34:41.790

Stephanie Bogan: For this very lively in depth and practical discussion because it was actually, I think, a really great way to talk about implementation, which

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01:34:42.090 --> 01:34:51.300

Stephanie Bogan: In some places, is a really boring topic, but not here. All right. Um, you guys. Thank you so much. I know most of you actually stayed around and we're like 10 minutes over, which never happens, but

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01:34:52.380 --> 01:34:58.710

Stephanie Bogan: Yeah, new frame of mind around marketing. Okay, waiting. Thanks for the comment, Tiffany. Thank you so much to all of you.

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01:34:59.430 --> 01:35:08.070

Stephanie Bogan: Remember you've got marketing retreat. You've got loads of content. You've got all the new ways that we're engaging and most important is you've got a simple sticky way.

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01:35:08.550 --> 01:35:17.310

Stephanie Bogan: To implement marketing that will help you create a wildly successful business and a life that you love, so go out and make it happen. I will talk to you all very soon. Take care.