

FEBRUARY 22, 2021

Limitless Coaching Call
Creating Change



TODAY'S COACHES



ALYSE M'CONNELL
EMBRACING CHANGE



NATALIE BERGSMA
PLANNING CHANGE




TIFFANY CHARLES
LEADING CHANGE



FROM THIS
Managing



TO THIS
Navigating



It really is
ALL IN YOUR HEAD



1 Known and driven by you

- Ex. Implementing systems, planning for growth

2 Unknown and driven by you

- Ex. your kid driving, business growth requiring hiring

3 Not driven by you

- Ex. COVID, market or industry changes, an employee leaving

- Identify your predictable response to change. We all have one.
- Navigate change effectively.



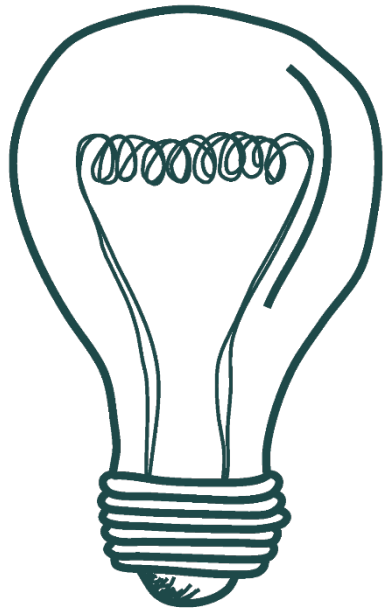


Change
typically comes with
RESISTANCE

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BIG IDEA

(Project, Priority, New Behavior)



THE CHANGE GAP



THE END RESULT



BEGIN

with the end in mind

- ③ What is the goal or outcome you want to create?
- ③ What is the timeline?
- ③ How will you measure success?
- ③ What do things look like on the other side?

What: Charge what I'm worth - raise fees!

How:

- Raise fees 25 bps on under-charged accts
- Start charging a separate planning fee

Outcome:

All clients are profitable

FIGURE OUT WHAT YOU NEED TO MAKE IT HAPPEN

- What skills are needed?
- Who can support you?
- What resources do you have?
- **What actions will you take to meet your commitment?**

Anticipate roadblocks

- What gaps do you need to solve for?
- Is the time available and set aside?
- Can you identify resistance points?

Confidently quote new fees
My Pod, Office Hours
Limitless tools & scripts

I'm not comfortable with the conversation
Unsure of fair value
Clients may push back

Complete Fee lesson
Review fee research
Practice the conversation
Get coaching

Designing an ACTION PLAN

- ③ Define the key milestones
- ③ Create actions for each milestone
- ③ Schedule time and secure support as needed
- ③ How will you hold yourself (and team) accountable?

3/1 - Complete a fee analysis and assess each current client

3/15 - Define my new fee schedule and update it on web and ADV

4/1 - Create communication plan and have scripts ready

4/15 - Practiced the conversation 15 times, worked with coach on my value

5/1 - Initial communication sent and client meetings set

6/30 - Fee raise complete



GETTING STARTED

ON PURPOSE PROJECT PLANNING

PROJECT IDEA CLARITY	Project/Focus	What is the outcome you want to achieve?	
IMPACT	How does this project make a difference?	What's possible with success?	What's cost of inaction/compromise?
TRANSPARENCY	START: _____	END: _____	TOP 3 OBJECTIVES:
	OWNER: _____	BUDGET: _____	
	KEY MILESTONES:		2 _____
			3 _____
	SKILLS/RESOURCES/NEEDS:		MOTIVATION/REWARDS:
ACCOUNTABILITY	SUCCESS METRICS:		
PROJECT OWNER: _____		DATE: _____	

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Leading CHANGE

TWO types of CHANGE:

1 PLANNED:

Deliberate or by design

"Change is inevitable; growth is intentional."

- Glenda Cloud

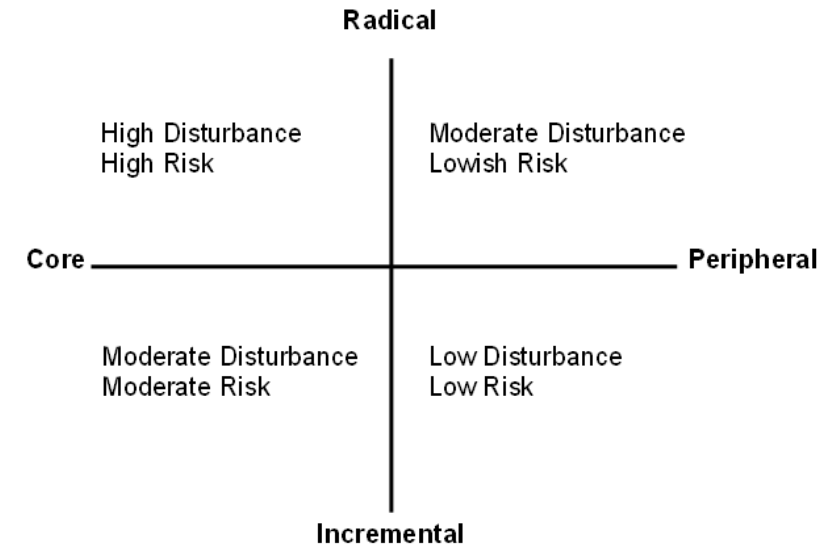
2 EMERGENT:

Unplanned or arising unexpectedly

"The only constant in life is change."

-Heraclitus

MANAGE AND MEASURE
change the same way you
do projects or the same way
you advise your clients.



Leading Planned CHANGE

PREPARE FOR CHANGE

- Understand the need
- Clarity re. what is changing & why
- Get various perspectives
- Assess the opportunities
- Assess the full risks
- Create a clear, defined plan:
 - Stakeholders
 - Scope of work
 - Resources
 - Time frame
 - Success measures

IMPLEMENT CHANGE

- Communicate the change
- Be open to feedback
- Team buy-in or time to digest
- Activate catalysts
- Remain visible and communicate often
- Roll out training
- Monitor & manage resistance
- Reduce risk and friction
- Space to adapt
- Transparency & accountability

ADOPT & SUSTAIN CHANGE

- Monitor adoption carefully
- Reinforce behaviors aligned with change
- Address lack of adoption proactively
- Measure the impact
- Refine based on what you learn
- Take pulse and respect change fatigue
- Process change fully

L I M I T L E S S



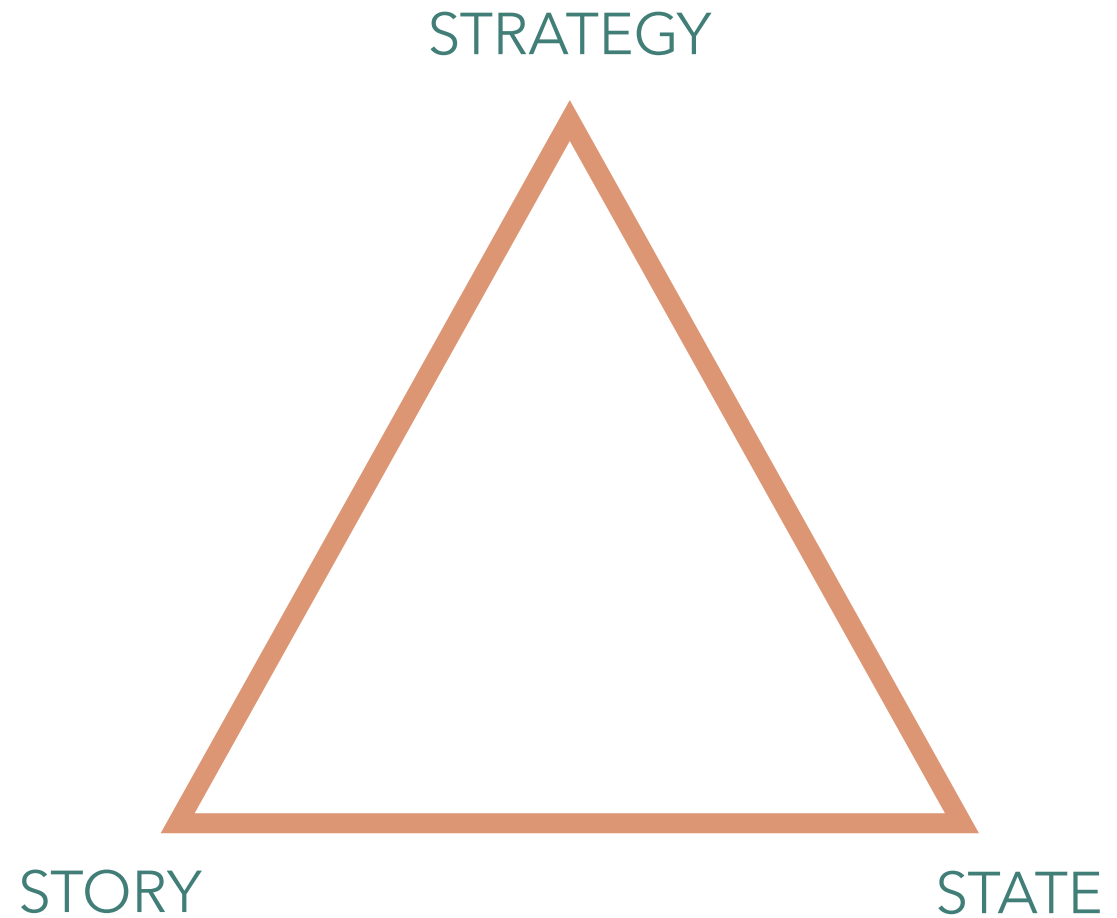
Leading Unplanned CHANGE

1 PAUSE

2 BREATHE

3 BREATHE AGAIN

4 GET CLEAR ON WHAT'S REALLY HAPPENING



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LET'S Dig In...

30-Minute Breakouts

EMBRACING CHANGE

Alyse McConnell



- *If you're feeling stuck or overwhelmed...*
- *If you struggling to create change that sticks...*

PLANNING CHANGE

Natalie Bergsma



- *If you want to define and scope projects effectively...*
- *If you want help identifying your next projects...*

LEADING CHANGE

Tiffany Charles



- *If you're leading a team through changes...*
- *And want to build a culture of accountability...*



KEY

Take-aways

It's share time!



LIMITLESS



IN- PRACTICE

RELATED LESSONS

- Managing Performance: Action & Accountability Lesson
- Mindset Mastery Learning Path

- On Purpose Planner
- Shift Your Thinking Workbook
- Personal Launch Plan
- Practice Benchmark Analysis
- 1 Page Annual Business Plan
- Quarterly Business Review
- Weekly Team Meeting Agenda

COACHING PATH

- On Purpose Planner

RECOMMENDED READING

- *Who Moved My Cheese*, Spencer Johnson
- *Start with Why*, Simon Sinek
- *Switch*, Chip Heath
- *Daring Greatly*, Brene Brown
- *Feel the Fear & Do it Anyway*, Susan Jeffers



LIMITLESS Q&A