



## Inbox Insights

- Weekly Wednesday Check-In
- Coaching Videos with Candice and Julie
- School of Advice pre-work with Carl Richards



## Good Vibes Tribe

- 54% of you taking it up a notch on Tribe
- Don't live here, just visit regularly (1-2x week check)

Events to Watch:

- Q2 PLP Quarterly Planning & Strategy Session
- Hiring & Training Rockstar Staff with Cooper (Coach Tanya's Rockstar)
- Marketing Entrepreneur Aligned with Coach Tiffany



## Lifestyle Advisors

5.03	Advisor Coach Office Hours
5.12 - 5.14	Value U. Virtual Retreat
5.17	Lifestyle Office Hours
5.24	Lifestyle Coaching Call #2

# WELCOME

APRIL

COACHING CALL

READY FOR THE  
HOT SEAT?

FOR TODAY'S  
QUESTIONS

[slido.com](https://slido.com), [#lifestyle](https://twitter.com/lifestyle)

# LIMITLESS

# Limitless Coaching Call

APRIL 26, 2021  
Getting Unstuck

# TODAY'S COACHES



TANYA NICHOLS



STEPHANIE BOGAN



CLARITY &  
ACCOUNTABILITY



Science of Success



Your Vision for Success



My Model Practice



Power of Productivity



Action & Accountability

COMMUNICATING  
YOUR VALUE



Nailing Your Niche



Telling Your Story



Finding Your Fee Model

DELIVERING  
MASSIVE VALUE



One Page Plan



Goals-Based Review



Amazing First Meeting



5-Star Service System



Client Surges



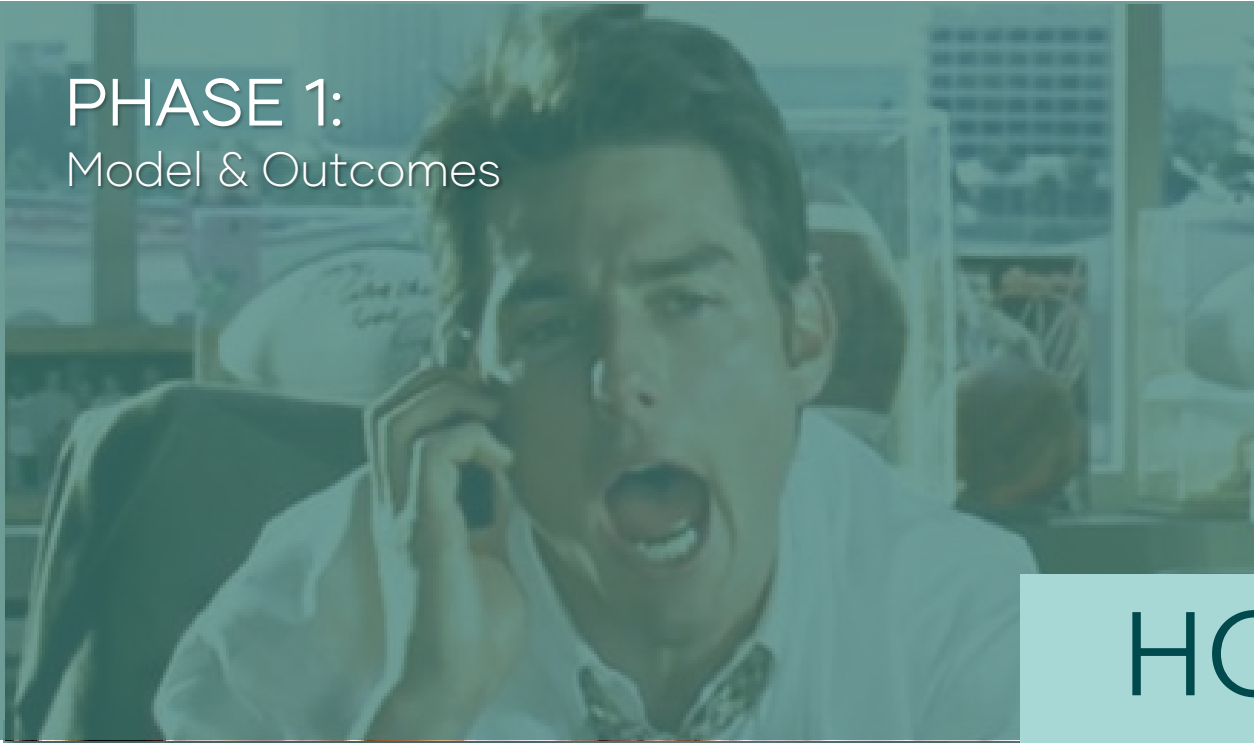
Model Meetings



Say Yes to No Stress Prospect Process

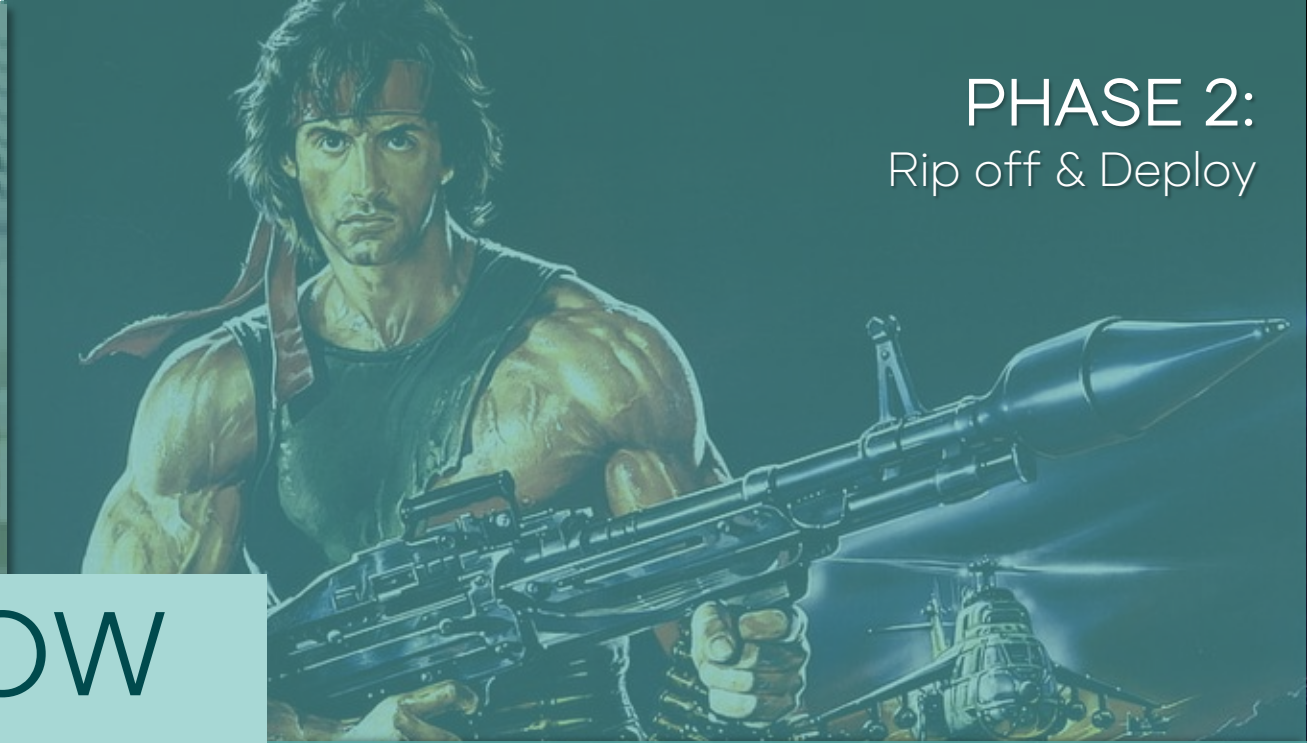
## PHASE 1:

Model & Outcomes



## PHASE 2:

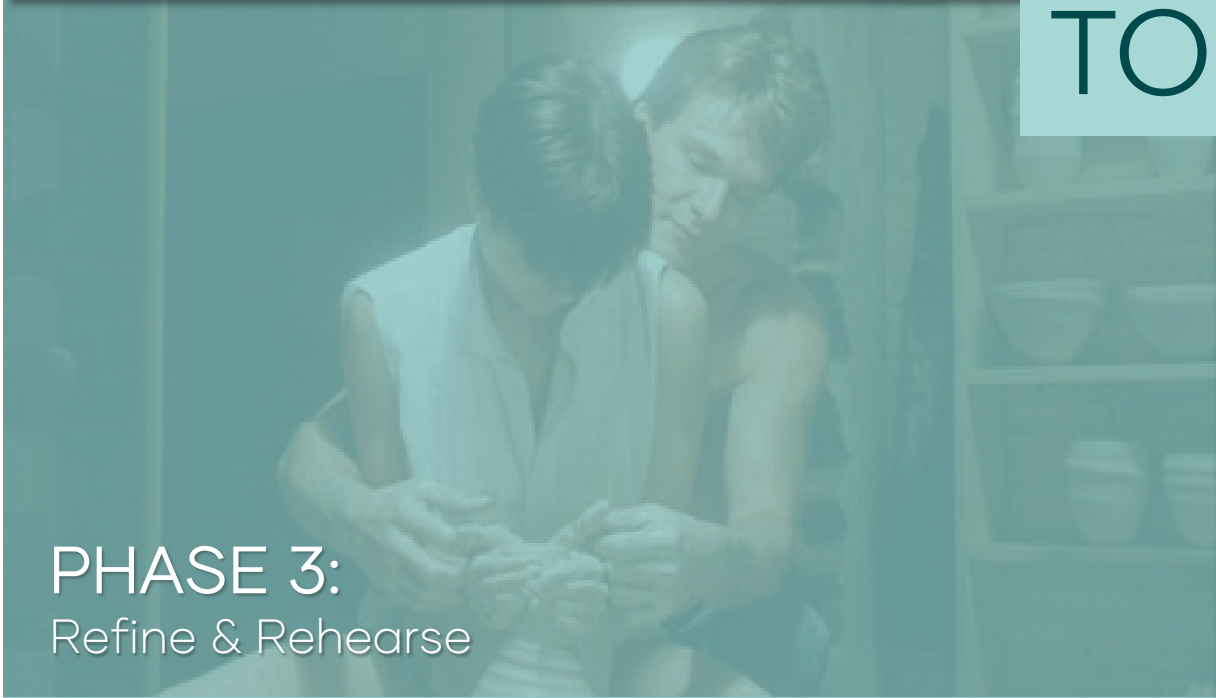
Rip off & Deploy



# HOW TO GSD

## PHASE 3:

Refine & Rehearse



## PHASE 4:

Re-deploy & Ramp Up



# HOW TANYA TOOK IT UP A NOTCH



# Personal LAUNCH PLAN

Get Clear, Get Focused, Get to Work



**PERSONAL LAUNCH PLAN** | **LIMITLESS**

**MY 2021 LAUNCH PLAN**

**GET CLEAR**

MY BIG WHY

SUCCESS METRICS

	YEAR EN
AUM	
Revenue	
Average RPC	
Average AUM bps	
EBOC	
# Days Off	
Avg Work hrs/Wk	
Return on Time	
# Clients	
# Ideal Clients	
# Prospects in Pipeline	

NICHE

PROFESSIONAL PRIMARY GOAL

KEY OBJECTIVES

- 1.
- 2.
- 3.

PROFESSIONAL PRIMARY GOAL

KEY OBJECTIVES

- 1.
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**ON PURPOSE PROJECT PLANNING**

PROJECT IDEA CLARITY

Project/Focus

OUTCOME

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 inactivity/compromise?

START: [ ] END: [ ]

OWNER: [ ] BUDGET: [ ]

KEY MILESTONES:

TOP 3 OBJECTIVES:

- 1.
- 2.
- 3.

SKILLS/RESOURCES/NEEDS:

MOTIVATION/REWARDS:

SUCCESS METRICS:

PROJECT OWNER: [ ] DATE: [ ]

**LIMITLESS**

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# TURNING THE TABLES



**slido**

#lifestyle



LIMITLESS Q&A