

LIMITLESS Coaching Call Transcript

MARCH 22ND, 2021
LIMITLESS COACHING CALL TRANSCRIPT
DEFINING YOUR VALUE

51

00:07:04.260 --> 00:07:10.980

Stephanie Bogan: Okay, so today is our march delivering and defining value coaching call we're really going to dive into.

52

00:07:11.430 --> 00:07:20.220

Stephanie Bogan: what it takes to define and deliver the value on the concepts that we've talked about, and to really highlight where we're going so I have the good fortune.

53

00:07:20.640 --> 00:07:29.490

Stephanie Bogan: of having been with me on today's call and, as we were preparing for this Paul he came up he shared a quote, that I thought was so awesome that we're going to put it right here on the slide.

54

00:07:30.210 --> 00:07:41.880

Stephanie Bogan: Which is don't have a six things whole as one thing and I thought that was maybe not the most eloquent quote anyone has ever used is super on point in terms of.

55

00:07:42.300 --> 00:07:51.570

Stephanie Bogan: Where we are right now in the program, which is that understanding our behavior is the biggest driver of our success is really important, which means we want to understand.

56

00:07:51.960 --> 00:07:58.950

Stephanie Bogan: What about our behavior is helping us move forward and what about our behavior is really holding us back.

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00:07:59.250 --> 00:08:06.900

Stephanie Bogan: So, at our last retreat, we did a survey check in how is everyone feeling in the instance of clarity, transparency and accountability, I am sharing those results with you.

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00:08:07.770 --> 00:08:15.720

Stephanie Bogan: A number of you are in high vibes like you were just rocking and rolling most of you are progressing positively and above the line which is very normal.

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00:08:16.080 --> 00:08:26.700

Stephanie Bogan: A few of you are progressing, but not at the pace or or you know the progress that you would like and Lisa and I have checked in the vast majority of you, this is because of external circumstances that you're



navigating.

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00:08:27.000 --> 00:08:29.910

Stephanie Bogan: Were personal circumstances we're going to help you focus around those.

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00:08:30.270 --> 00:08:35.190

Stephanie Bogan: And a handful of you, I think, actually four of you are feeling a little bit stuck and struggling.

62

00:08:35.460 --> 00:08:45.690

Stephanie Bogan: Not necessarily in the work that we're doing but in rate the pace of progress in your practice, so I want you all to know that we take this feedback very seriously and Lisa and I will be following up with you both.

63

00:08:45.900 --> 00:08:53.880

Stephanie Bogan: As a group, and in tribe, and personally depending on where you kind of placed yourself to make sure that we're helping you move forward in the most positive way.

64

00:08:55.050 --> 00:09:00.570

Stephanie Bogan: Which means that I need you to get clear where you are on this page.

65

00:09:01.470 --> 00:09:10.860

Stephanie Bogan: And what I mean by that is we've covered the science of success, your vision my model practice power productivity action and accountability and with our last retreat nailing your niche telling your story and finding your.

66

00:09:11.070 --> 00:09:16.740

Stephanie Bogan: feet your fee model which is really saying i've gotten clear on what I want to create.

67

00:09:17.160 --> 00:09:27.960

Stephanie Bogan: i've created the plans and the priorities that I know I need to focus on and then i've created the accountability and the schedule and the systems and the staff who leverage or have made meaningful strides taking some steps.

68

00:09:28.350 --> 00:09:31.440

Stephanie Bogan: To create the account to take action and create the accountability that I need.

69

00:09:32.160 --> 00:09:44.550

Stephanie Bogan: If you have not done that which the with the feedback does not suggest that you haven't but that's really about the main thing which we're going to talk about at the end of this call, which is keeping the main thing, the main thing.

70

00:09:45.060 --> 00:09:49.920



Stephanie Bogan: throughout the course of the year, which is you know can be more challenging than it seems.

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00:09:50.310 --> 00:09:57.420

Stephanie Bogan: we've also talked about telling your story, which is what we want to dive into even more today in terms of nailing your niche telling your story and finding your fee model.

72

00:09:57.810 --> 00:10:05.640

Stephanie Bogan: Because, at the end of the day, in order to define and package your value, you first have to communicate it and then you get to deliver it.

73

00:10:06.390 --> 00:10:13.980

Stephanie Bogan: Up to this point we've talked about communicating your value what you do, how you do it the fees that you charge how to make it substantive and sticky.

74

00:10:14.520 --> 00:10:23.760

Stephanie Bogan: And again we'll continue those conversations, but in once we communicate our value, then we have to deliver on the promise and what does that mean.

75

00:10:24.600 --> 00:10:31.230

Stephanie Bogan: That means we actually have to deliver that value so as Ben and I were talking about this coaching call in particular.

76

00:10:31.830 --> 00:10:37.260

Stephanie Bogan: This is the book that he came up with and wanted to really talk with you about not so much for the contents of the book and.

77

00:10:37.680 --> 00:10:45.960

Stephanie Bogan: they're great, but really kind of what did drive for what drove for him in terms of thinking about how he delivers value, then you want to talk about that a little bit.

78

00:10:47.400 --> 00:10:53.970

Benjamin Brandt CFP®, RICP: yeah so clockwork by Mike mcalla which I believe that's how you say his last name highly recommended for reading.

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00:10:54.450 --> 00:10:58.860

Benjamin Brandt CFP®, RICP: One of the the theme of the book is obviously how to get your business to run like clockwork.

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00:10:59.220 --> 00:11:10.290

Benjamin Brandt CFP®, RICP: And the litmus test at the end of the book was to take six weeks out of your practice and totally off the grid unplug for six weeks, and if you can come back to your business after six weeks.

81



00:11:10.770 --> 00:11:14.730

Benjamin Brandt CFP®, RICP: Having implemented all the things he talks about in the book your business should be better than when you left it.

82

00:11:15.060 --> 00:11:23.820

Benjamin Brandt CFP®, RICP: Now full disclosure, I have not been able to leave my business for six weeks that idea terrifies me, but I have implemented a lot of the things that he talks about leading up to that process.

83

00:11:24.210 --> 00:11:30.480

Benjamin Brandt CFP®, RICP: One of the things he talks about is the qb are the queen bee role that's The thing that you and only you can do.

84

00:11:30.900 --> 00:11:36.690

Benjamin Brandt CFP®, RICP: You delegate everything else, but then you, you pointed back to the queen bee role so you're doing only what you can do.

85

00:11:36.840 --> 00:11:43.320

Benjamin Brandt CFP®, RICP: you're where you're delivering your most value and then everything else is able to be delegated so reason that I bring up this this book is.

86

00:11:43.530 --> 00:11:52.200

Benjamin Brandt CFP®, RICP: Over talking about delivering value to our clients, we need to figure out what specifically makes us special and what only we can do we can delegate everything else, but then.

87

00:11:52.500 --> 00:12:03.300

Benjamin Brandt CFP®, RICP: In our processes that point back to what makes us special makes us unique so queen V role is a name don't confuse that with quarterly business reviews picture beyonce don't picture of spreadsheets queen bee role.

88

00:12:03.630 --> 00:12:11.640

Benjamin Brandt CFP®, RICP: Right, then we we all want to look at you know your unique value proposition or unique sales proposition So those are all three sort of the same thing.

89

00:12:12.030 --> 00:12:20.790

Benjamin Brandt CFP®, RICP: different ideas from different books but that's what we want to think about when we're talking about delivering value what what is valuable that only you can do and then we're going to spend a lot of time, focusing on that.

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00:12:22.260 --> 00:12:31.830

Stephanie Bogan: Well, and the reason that this is so important, I really want you guys to catch this is that there is a very big difference between communicating your value, which is making a promise.

91

00:12:32.700 --> 00:12:45.690



Stephanie Bogan: and delivering on your value, which is keeping the promise and if we're really honest we're pretty good at making promises i'm not saying again we have a whole section on communicating better and more clearly and confidently and all of that.

92

00:12:46.380 --> 00:12:50.280

Stephanie Bogan: But in general we're pretty good at making promises, where do we get hung up.

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00:12:51.480 --> 00:12:58.740

Stephanie Bogan: We think about everything that's competing for our time and our attention, where do we get hung up we get hung up in the in delivering on those promises.

94

00:12:59.280 --> 00:13:12.150

Stephanie Bogan: Because what's required for us to deliver is very much like the contents of the book where if you've read Peter drucker's effective executive, or if you've read essentialism by Greg mcewen or any number of business books.

95

00:13:12.660 --> 00:13:23.730

Stephanie Bogan: In the end, it's about keeping the main thing, the main thing which, in the case of clockwork is about building a business that allows you to take six weeks off did anybody see me write that down when Ben said that.

96

00:13:25.740 --> 00:13:27.870

Stephanie Bogan: Does anybody have any guesses as to why.

97

00:13:29.760 --> 00:13:31.590

Benjamin Brandt CFP®, RICP: Is the most subtle beyond say reference.

98

00:13:31.860 --> 00:13:47.520

Stephanie Bogan: No, it was the right I don't i'm not yet comfortable taking that six weeks off, which means that right, one of the goals that we can focus prioritize not necessarily now is right, the litmus test of a practice moving into the next round is, can you take that six weeks off.

99

00:13:48.120 --> 00:13:50.370

Benjamin Brandt CFP®, RICP: When I said that's the black belt level, I think.

100

00:13:50.520 --> 00:14:02.910

Stephanie Bogan: It is the black belt level it is when I started the the mission of system monetizing I call it just add water right like, how do you systemized everything so it's so simple been an alien could come down read the instructions and follow it.

101

00:14:03.330 --> 00:14:09.570

Stephanie Bogan: And it is very much that idea of you know how do you create things so that they're lather rinse and repeat.



102

00:14:10.140 --> 00:14:16.890

Stephanie Bogan: And you know we get so caught up in the doing that we that we forget that the, the main thing is the delivery.

103

00:14:17.310 --> 00:14:23.370

Stephanie Bogan: Which means we have to build that business that has the standardized systems and the defined clients and defined services.

104

00:14:23.640 --> 00:14:33.840

Stephanie Bogan: And the staff know what they need to do and when they need to do it, so that we can actually leave for six weeks and know that we're going to get a predictable response so when I first got on this mission.

105

00:14:34.440 --> 00:14:41.490

Stephanie Bogan: is very much the same way Ben I don't remember what I had read or how I decided if it, I was like i'm going to this was a long time ago, so i'm going to take a month off.

106

00:14:42.060 --> 00:14:52.770

Stephanie Bogan: Or take a month off out of my practice that's what's going to legitimate that's what's going to make it a business, and that is my main thing that's my goal, so we focused on that and literally we took a month off we traveled to Southeast Asia.

107

00:14:53.070 --> 00:15:08.940

Stephanie Bogan: It was incredible I came back a month later, to a single red folder in my inbox that said stuff that only stephanie can look at literally like that was that was what was left after that time because we had made the main thing.

108

00:15:09.750 --> 00:15:17.400

Stephanie Bogan: Right getting to that level of standardization, that will be the main thing for some of you right now, it may be the main thing for Ben is he looks at the next level.

109

00:15:17.730 --> 00:15:21.180

Stephanie Bogan: But it does not mean that it's, the main thing for everyone at this moment.

110

00:15:21.780 --> 00:15:32.550

Stephanie Bogan: it's about where you are in the milestones to the main thing, whatever it is for you and again that goes back to the vision and the clarity and what it is you're really here to accomplish.

111

00:15:33.060 --> 00:15:43.200

Stephanie Bogan: Understand that to accomplish it one, you must get good at communicating the value you deliver and to you must get consistently good at delivering on that value.

112

00:15:43.950 --> 00:15:52.200



Stephanie Bogan: absent that you're going to create a lot more stress a lot more work and a lot more struggle that is needed are we in agreement on that anybody everybody good okay.

113

00:15:53.460 --> 00:15:59.460

Stephanie Bogan: Alright, so now let's add to that that you have a really difficult job.

114

00:16:00.360 --> 00:16:06.750

Stephanie Bogan: I don't mean the planning and the investments in the technical and the compliance and the CEO in the market that is difficult enough.

115

00:16:07.200 --> 00:16:12.330

Stephanie Bogan: I was having a conversation with Michael gets us last week, one of our coaching conversation she so the great story.

116

00:16:12.660 --> 00:16:19.290

Stephanie Bogan: I can't remember the name of the book but it's by a restaurant tour Danny something, and he was talking maybe some of you have read the book, you can tell me.

117

00:16:19.950 --> 00:16:27.570

Stephanie Bogan: That he was saying, like this really resonated with me this idea that is right as a restaurant owner, the mentor so like this is what I want you guys to think about.

118

00:16:28.860 --> 00:16:36.120

Stephanie Bogan: This is your table I hand you with salt shaker Ben this is your salt shaker this is your table as a restaurant owner.

119

00:16:36.930 --> 00:16:50.550

Stephanie Bogan: Your job is to tell me where on the table, you want the salt shaker ready, and then I gave it to Ben and Ben said sit on the table, and I say hey Ben are you sure sure that's where you want it, and then the story that Danny the owner does.

120

00:16:51.660 --> 00:17:02.100

Stephanie Bogan: God, think about it now right peyton are you really sure that's the sales presentation, you want to use like you take that second to think about it right it's like here here is definitely where I want the salt shaker.

121

00:17:02.670 --> 00:17:12.630

Stephanie Bogan: And then the mentor goes Okay, thank you any moves the salt shaker to the edge of the table as well now, what are you going to do so, the owner walks up and he moves it to the back of the table.

122

00:17:13.800 --> 00:17:23.490

Stephanie Bogan: And then the mentor walks over and says thanks honey was the salt shaker to the edge of the table, what are you going to do, and the undergoes i'm going to actually then we're going to the table and the.



123

00:17:24.630 --> 00:17:28.980

Stephanie Bogan: mentor walks over was it to the edge of the table for the third of the fourth time he's like.

124

00:17:29.400 --> 00:17:33.810

Stephanie Bogan: What are you going to do and he's like damn man move it to the Center of the table and he's like.

125

00:17:34.080 --> 00:17:38.550

Stephanie Bogan: We need you to be really clear that if you want to be successful in this business as an owner your job.

126

00:17:38.790 --> 00:17:45.570

Stephanie Bogan: is to understand that you will always be moving the salt shaker to the Center of the table that there is a force to human nature.

127

00:17:45.900 --> 00:18:01.740

Stephanie Bogan: A gravity that these are my words right that pose that that clear vision of what you want, in the outcome, you want to create damage, I want the salt shaker right here, and yet somehow 24 hours 48 hours 72 hours later, something has spiral that salt shaker to the end of the table.

128

00:18:03.180 --> 00:18:09.540

Stephanie Bogan: Now you agree with me that that is the challenge right like we are constantly figuring out how to come back to the standard.

129

00:18:10.200 --> 00:18:20.370

Stephanie Bogan: here's what I shared with Michael I said that's really challenging I wholeheartedly agree with you that's where we build systems and standards and there's books, like a math and clockwork I said i'm gonna i'm going to take that up one notch.

130

00:18:21.390 --> 00:18:32.700

Stephanie Bogan: And i'm going to challenge you to understand and invite us all to recognize that our job is even harder than that your job is even harder than that because your salt shaker is invisible.

131

00:18:34.500 --> 00:18:42.780

Stephanie Bogan: and Michael salt shaker is even more invisible, because it is all thought truly your salt shaker is intangible.

132

00:18:43.470 --> 00:18:49.740

Stephanie Bogan: it's intangible that's why we have to create a container for the story right its substantive and sticky.

133

00:18:50.610 --> 00:19:00.660

Stephanie Bogan: right we deliver portfolio value whatever like you can go back to all the conversations around telling your story and sales presentation and, if you look at them what you realize is we're taking all this stuff that



you talk about.

134

00:19:01.230 --> 00:19:07.620

Stephanie Bogan: And we're packaging it into containers that people in their brains can really make sense of and as simple and easy and comfortable way.

135

00:19:08.910 --> 00:19:19.830

Stephanie Bogan: that's defining value, you all know better than anything I need to tell you that measuring value is one of the harder things to do with clients over time, they forget the advice you gave him, six months ago.

136

00:19:20.160 --> 00:19:27.600

Stephanie Bogan: Right, the markets are up the markets are down what's happening their life, our job is to give them a yardstick by which to measure the value.

137

00:19:28.620 --> 00:19:35.160

Stephanie Bogan: that's why we define it that's why ben's three value prop right he knows what his unique value proposition is.

138

00:19:35.580 --> 00:19:43.530

Stephanie Bogan: And when we redefined his sales process to improve his conversion from listeners to re qualified prospect of qualified leads.

139

00:19:44.250 --> 00:19:50.610

Stephanie Bogan: He took that and really defined what his value proposition is who he could really serve with it.

140

00:19:51.210 --> 00:19:58.260

Stephanie Bogan: And then the three legs of that value proposition right the container by which people could measure.

141

00:19:58.860 --> 00:20:11.220

Stephanie Bogan: Whether that was a value they wanted to participate in and then is he's having the sales presentations and the client review meetings and managing expectations and down markets and all that on a go forward basis Ben what is he always going back to.

142

00:20:12.600 --> 00:20:13.620

Benjamin Brandt CFP®, RICP: access and guardrails.

143

00:20:14.220 --> 00:20:20.220

Stephanie Bogan: always like his two anchors whatever they are so your job isn't necessarily to have bins anchors.

144

00:20:20.640 --> 00:20:29.730



Stephanie Bogan: Your job is to know what your anchors are what are the two or three things that you will deliver to those clients reliably and consistently without fail.

145

00:20:30.060 --> 00:20:32.700

Stephanie Bogan: As a result of working with you that's the brand promise.

146

00:20:33.120 --> 00:20:43.950

Stephanie Bogan: The value proposition right we help advisors master their mindset methods, they can accelerate their success rate work with greater freedom and live with greater like work with greater success and live with greater freedom did that I know man valuable.

147

00:20:45.390 --> 00:20:50.340

Stephanie Bogan: Like everything, if you read my writing I was writing an article is what is it all come back to you.

148

00:20:50.850 --> 00:21:04.740

Stephanie Bogan: Everything on our website every conversation you hear me having a coaching call every lesson that you watch online every single piece of content that you read from us every article that I write every speaking engagement doing that I deliver what do you always hear.

149

00:21:06.660 --> 00:21:11.370

Stephanie Bogan: Work with greater success live with greater freedom in some form or fashion in some form or fashion.

150

00:21:12.870 --> 00:21:20.880

Stephanie Bogan: that's the story anchor everything I do comes back to that everything then does comes back to history anchor of retiring ready.

151

00:21:21.390 --> 00:21:26.070

Stephanie Bogan: The way he delivers that right it primarily is taxes and guard rails or his story anchors.

152

00:21:26.550 --> 00:21:42.930

Stephanie Bogan: If you go back through the messaging worksheet it takes you through multiple versions of story anchors so that you can define that into that sort of distilled down this was distill down version of the story right 60 seconds versus six minutes versus 60 minutes.

153

00:21:45.000 --> 00:21:45.510

Stephanie Bogan: alright.

154

00:21:46.110 --> 00:21:52.860

Benjamin Brandt CFP®, RICP: pod it's really it's really important to If I could just kind of bought in here it's really important to provide this to a prospect because.

155



00:21:53.340 --> 00:22:00.270

Benjamin Brandt CFP®, RICP: If you don't give them something to compare to they're going to fill that void with something else or they're going to compare that to if you're lucky.

156

00:22:00.450 --> 00:22:04.200

Benjamin Brandt CFP®, RICP: they're going to compare that to other financial advisor relationships that they've had or known about.

157

00:22:04.410 --> 00:22:11.610

Benjamin Brandt CFP®, RICP: If you're unlucky they're going to compare you to this this picture of an ideal advisor that they have in their head so they're going to fill that void with something.

158

00:22:11.820 --> 00:22:17.400

Benjamin Brandt CFP®, RICP: it's probably better if you do it in a way that's flattering to you that's pointing back to your queen bee role so.

159

00:22:18.000 --> 00:22:29.070

Benjamin Brandt CFP®, RICP: you've got to define this invisible very difficult for you harder for realtors even harder for life coaches we're not totally disadvantaged here which you've got to fill this void with something or they will do it for you and it probably won't be flattering.

160

00:22:30.900 --> 00:22:39.660

Stephanie Bogan: hey that's a great point Ben and hear it from a coaching perspective here's what I will offer which is every human being interested in interaction with expectations.

161

00:22:40.320 --> 00:22:50.790

Stephanie Bogan: Whether they know it or not, whether they share it or not, is an entirely different story, you have a lot to say about that which was about as we talked about learning more calls and sales presentations.

162

00:22:51.480 --> 00:23:04.050

Stephanie Bogan: But ultimately it's about you, creating the yardstick the ruler, by which your work and your value will be measured, because if you don't to vince point they will how many of you have ever had someone call.

163

00:23:04.500 --> 00:23:08.310

Stephanie Bogan: And then you didn't call the back, like literally within two hours and they called again.

164

00:23:09.270 --> 00:23:22.080

Stephanie Bogan: And maybe they call that third right listen is like the third or the fourth time in this same day that person's calling back, how many of you have a super complicated high net worth clients that will call you, and they will call you back for four or five days.

165

00:23:23.640 --> 00:23:26.280

Stephanie Bogan: Right what's the difference between those two people.



166

00:23:28.830 --> 00:23:34.860

Stephanie Bogan: Just their expectation that first person is calling back a second, third time, because in their mind somewhere there's a story.

167

00:23:35.250 --> 00:23:46.950

Stephanie Bogan: That the expectation is when they call you, you should respond within two or three hours, and if you don't offer another expectation that is the one you will be judged by whether they tell you or not, which they won't, by the way, no one walks in and says.

168

00:23:47.340 --> 00:23:51.210

Stephanie Bogan: I actually expect you to return my phone calls within 48 hours because my last advisor doing do it.

169

00:23:52.080 --> 00:23:57.810

Stephanie Bogan: They don't tell you that it's your job to say hey is a function of working with us, I would love to sit down and talk with you about how.

170

00:23:58.140 --> 00:24:06.660

Stephanie Bogan: We engage with us your trusted advisor right there will be things that we do that are steady and consistent we do them every year, these are those things right we'll have our meetings in the spring and fall.

171

00:24:07.200 --> 00:24:12.990

Stephanie Bogan: And there are things that will come up a lot like there's 1000 ways that I can write you guys hear me like 15 different ways to do it.

172

00:24:13.680 --> 00:24:26.400

Stephanie Bogan: 15,000 different ways to do it it's about getting really clear on what the yardstick you're going to measure is so that your story supports the yardstick so as I shared when Ben went through that process.

173

00:24:26.880 --> 00:24:35.280

Stephanie Bogan: And we got really clear on where there was a breakdown in the clarity of the messaging then he went out and did work completely on his own which he gets credit for it.

174

00:24:35.580 --> 00:24:46.320

Stephanie Bogan: really clear on that we're on that one thing that is position then using what he learned here to figure out okay here are the two or three things that really support that anyway back to the sales presentation.

175

00:24:46.770 --> 00:24:56.820

Stephanie Bogan: and refined it went back to the website went back to the podcast and started to tweak and refine those messages, so that they wholeheartedly supported.

176

00:24:57.210 --> 00:25:02.760



Stephanie Bogan: The value proposition, so that no matter what, or when or how you hear been you're going to get that message.

177

00:25:03.330 --> 00:25:09.180

Stephanie Bogan: When you do, that the consistency creates such a clarity and confidence for you, but a gravity.

178

00:25:09.480 --> 00:25:18.420

Stephanie Bogan: For others, that one they're drawn to you, but to that the the secret to making it work is having the yardstick by which you define and mentor to that value.

179

00:25:19.050 --> 00:25:27.810

Stephanie Bogan: Setting those expectations with the clients and then building your experience around it, which is right is the clockwork piece of it, the standards and the systems and the surface model.

180

00:25:29.130 --> 00:25:38.190

Stephanie Bogan: So I think it's really important that we all get really clear that we are at one level moving a salt shaker back and forth across the table that's the clockwork piece of the conversation.

181

00:25:38.550 --> 00:25:46.410

Stephanie Bogan: But then, in doing that, we are delivering on the story and the promise that we're making and our job is to make that as easy as possible for prospects.

182

00:25:46.770 --> 00:25:54.750

Stephanie Bogan: To understand and for clients to get as they work with us an ongoing basis, one of my favorite examples of this Ben I think we have.

183

00:25:55.320 --> 00:26:05.190

Stephanie Bogan: Your questions if a prospective advisor in here, which is a core piece that we recommend everyone have a version of which is the client service standard which you talk about and we get to me and.

184

00:26:05.580 --> 00:26:11.610

Stephanie Bogan: And the details of the service model and the prospect process, but this is kind of the preview of how it shows up and telling the story is.

185

00:26:11.970 --> 00:26:19.680

Stephanie Bogan: One of the things that we know is people don't have a ton of clarity about financial advisors, the differences between them a good one, a bad one, what questions to ask.

186

00:26:20.010 --> 00:26:26.520

Stephanie Bogan: And so the easiest way to solve, for that is to set those expectations in a document that is basically an faq.

187



00:26:26.850 --> 00:26:31.800

Stephanie Bogan: What are the things that you should be asking but advisor, what are the things you should be thinking about what questions you should be asking.

188

00:26:32.220 --> 00:26:39.900

Stephanie Bogan: By framing those on the front end you're giving them a filter by which to intake everything you share with them measure it and go.

189

00:26:40.380 --> 00:26:47.070

Stephanie Bogan: pretty much meets the standard, it also depends point if they take that somewhere else the odds are overwhelming.

190

00:26:47.400 --> 00:26:59.760

Stephanie Bogan: that the person to whom they take it or not going to meet those standards and if they do great maybe they're a better fit will let the prospect decide that because we know we're going to be okay, no matter what so there's different go ahead and.

191

00:26:59.910 --> 00:27:07.050

Benjamin Brandt CFP®, RICP: there's this questions to ask to ask perspective advisor that's a great peek behind the curtain as to kind of what this whole presentation today is about.

192

00:27:07.320 --> 00:27:12.270

Benjamin Brandt CFP®, RICP: In that this was one of the resources available to me, as a as a first year student and limitless.

193

00:27:12.570 --> 00:27:25.050

Benjamin Brandt CFP®, RICP: I did, is, I was told I took this and I use it to create context for the client and create and start to set those expectations I just still that through what makes me unique and I answered the three answer those questions to make to.

194

00:27:25.380 --> 00:27:33.570

Benjamin Brandt CFP®, RICP: To what makes me special right my my queen bee role and then redeploy that into the marketplace and we're going to talk in a couple slides about about how you can do that for yourself, but this is.

195

00:27:33.810 --> 00:27:43.380

Benjamin Brandt CFP®, RICP: Really evaluate this piece here, I took it from the website made it my own had my graphic artists create this make sure it pointed back to what makes me unique and then it put it back out of the marketplace so.

196

00:27:43.890 --> 00:27:55.080

Benjamin Brandt CFP®, RICP: It does a lot of the things that we're talking about here, creates context and and sets expectations, a lot of really important stuff so make sure you check that one out and that's what I used, three, four years ago, when I first started so i'm still redeploying things.



197

00:27:55.710 --> 00:28:01.380

Stephanie Bogan: And you didn't miss anything we haven't officially gotten to that lesson yet, but we are giving you the preview right on one of the ways.

198

00:28:01.800 --> 00:28:12.600

Stephanie Bogan: That you can turn that invisible intangible value and the need to you know can create a container and a yardstick to measure it by in the client service standards and the faq.

199

00:28:12.960 --> 00:28:22.140

Stephanie Bogan: or one example, that the client service standards, I think tanya's got a great example of those house and, if you want to grab those and post them in the chat but they're definitely available on the website.

200

00:28:22.500 --> 00:28:29.040

Stephanie Bogan: So notice ben's pieces on the front end i'm creating the translation right here's the rosetta stone, if you will.

201

00:28:29.520 --> 00:28:36.630

Stephanie Bogan: And then tanya's piece on the back end is just another one of 10 versions of that which basically says, as we partner together.

202

00:28:36.990 --> 00:28:44.490

Stephanie Bogan: These are the service standards by which will mother measure me and then right, obviously, the one page plan you're going to this will make a lot more sense to you and May.

203

00:28:44.850 --> 00:28:52.410

Stephanie Bogan: But rate the planning process, the one page plan and your advice and service model is how you're going to write let them know that you're delivering on that value.

204

00:28:53.250 --> 00:29:00.210

Stephanie Bogan: You can never do that, no matter how good you are where, at least not feel confident you're doing it if you have not defined.

205

00:29:00.540 --> 00:29:08.130

Stephanie Bogan: The value you can't put in that container and then the usual rate is you'll hear a lot about in the future months put it into a service model.

206

00:29:08.670 --> 00:29:17.160

Stephanie Bogan: Caring knowledgeable and experienced are not differentiators they are not your story, ladies and gentlemen, they are table stakes, the table stakes.

207

00:29:17.610 --> 00:29:24.960

Stephanie Bogan: And if you expect the average consumer enter the difference between fiduciary and fixed fee and



fee only marshmallows.

208

00:29:25.290 --> 00:29:33.840

Stephanie Bogan: Those are all how people really don't care about your how they care about their problems and your ability to give them solutions that's where you tell your story around.

209

00:29:34.350 --> 00:29:41.730

Stephanie Bogan: We have to get to the how and the fees, obviously, so they can decide if they see the same value that we do, but beyond that it's all about telling the story.

210

00:29:42.480 --> 00:29:49.110

Benjamin Brandt CFP®, RICP: Is that significant effort into what makes you special because if you just sort of word vomit what you think they want to hear you're actually.

211

00:29:49.230 --> 00:29:57.810

Benjamin Brandt CFP®, RICP: we're doing yourself harm when you think you're doing yourself good i'm feeling lonely well so as everyone else, no one cares i'm a fiduciary i'm legally obligated to my clients best interest.

212

00:29:58.140 --> 00:30:00.480

Benjamin Brandt CFP®, RICP: Anybody who wouldn't say that right.

213

00:30:00.810 --> 00:30:09.000

Benjamin Brandt CFP®, RICP: Is it cool, so what else is going to say it, so when you're saying the things that everyone else says you're just reinforcing this context that you're just like every other financial advisor that anywhere else could ever meet.

214

00:30:09.240 --> 00:30:14.250

Benjamin Brandt CFP®, RICP: So you think that you're doing yourself a favor by saying that during your prospecting process and putting that on your website.

215

00:30:14.490 --> 00:30:26.970

Benjamin Brandt CFP®, RICP: But really what you're doing is you're reinforcing this preconceived notion that you're just like everybody else so they're just going to pick the cheapest advisor that they're in front of so really spend some significant time figuring out what makes us special I.

216

00:30:27.060 --> 00:30:29.040

Benjamin Brandt CFP®, RICP: don't know if, like special actually special.

217

00:30:29.160 --> 00:30:32.700

Stephanie Bogan: yeah no I love, I did you guys catch the part where Ben said work from it.

218



00:30:34.290 --> 00:30:36.000

Stephanie Bogan: And you did you catch that it made me giggle.

219

00:30:36.480 --> 00:30:46.200

Stephanie Bogan: So I have this what I thought, when I talk about this, I talked about this when we go to tell her story, we have this horrible tendency to use the what I call the show up and throw up method of sales, which is we tell them everything about.

220

00:30:46.440 --> 00:30:57.030

Stephanie Bogan: who we are and how we help and everything we could possibly do and every admire will attribute and every feature and benefit, and we hope that, in all of that they are able to grab the nugget that actually frickin matters to them.

221

00:30:57.480 --> 00:31:05.370

Stephanie Bogan: and translate that into Oh, he or she can help me create the outcome that I care about which by the way, is the only thing that I care about.

222

00:31:05.700 --> 00:31:18.870

Stephanie Bogan: that's it they care about their outcomes, if you listen to ben's value story or is unique value proposition right in the kind of the colloquial language or the two things that he constantly comes back to you, he comes back to taxes and guardrails why.

223

00:31:20.250 --> 00:31:21.900

Stephanie Bogan: Because what do they solve for.

224

00:31:22.920 --> 00:31:29.490

Stephanie Bogan: The two biggest pain points that his clients have I am right giving too much to Uncle Sam and do I have enough in my retirement.

225

00:31:29.790 --> 00:31:38.610

Stephanie Bogan: Do I have enough in my retirement paycheck to feel ready into enjoy the retirement that didn't work so hard for as long as been cannot in the affirmative to those two questions.

226

00:31:39.030 --> 00:31:43.770

Stephanie Bogan: Everything else is marshmallows they don't care i'm not saying that you don't have.

227

00:31:44.070 --> 00:31:55.170

Stephanie Bogan: The successful doctor or the engineer who doesn't love details, but that is just a strategy that they use to get comfortable with what you're recommending at the end of the day, they just want to do what works.

228

00:31:55.440 --> 00:32:00.600

Stephanie Bogan: So to ben's point that story worksheet that we gave you takes you through that process in a.



229

00:32:01.080 --> 00:32:11.670

Stephanie Bogan: In a multitude of ways, you can talk about approach and roll you can talk about your three key like we give you built into that worksheet because you're not going to go through that entire conversation and 60 seconds.

230

00:32:12.060 --> 00:32:19.980

Stephanie Bogan: Is everything you need to have a really good conversation around the story and then what you need to distill it down into that right, I help.

231

00:32:20.610 --> 00:32:23.370

Stephanie Bogan: I teach people how to retire like what's that short sticky version.

232

00:32:24.120 --> 00:32:32.010

Stephanie Bogan: So Ben didn't have that and Adam didn't have that on you didn't have that they had us having a conversation that said hey your scholarship receptive and sticky.

233

00:32:32.280 --> 00:32:42.870

Stephanie Bogan: it's literally I help link to blame go do this, that was what they had so I share that with you only to impress upon you, that any stories rationalizations or excuses that we make.

234

00:32:43.290 --> 00:32:53.400

Stephanie Bogan: Are that we are making excuses not results, the answer always, no matter how much I make it just add water, no matter how great the tools are no matter how perfect examples had been executed.

235

00:32:54.060 --> 00:33:06.630

Stephanie Bogan: It always requires you to pick it up and use it to make it your own and that, ladies and gentlemen, is the uncomfortable part of the process, which were actually and talk about all right, this is actually where we talked about it, what a great segue.

236

00:33:08.010 --> 00:33:18.030

Stephanie Bogan: it's almost like we planned this alright, so this is really about when Ben and I were having this conversation about really creating change in particular around telling and defining our story.

237

00:33:18.330 --> 00:33:27.510

Stephanie Bogan: We really sat down and said okay like Ben started talking about kind of the phase, I was like what are the phases, that you went through as you apply these lessons like I know them put me in your chair.

238

00:33:27.930 --> 00:33:33.330

Stephanie Bogan: And he was like Well, first, I had to get clear what I was building now we didn't have the model practice worksheet then it's.

239

00:33:33.840 --> 00:33:39.180



Stephanie Bogan: Like it's literally one of my favorite worksheets you should definitely complete it, if you cannot complete it.

240

00:33:39.570 --> 00:33:43.980

Stephanie Bogan: that's your main thing complete the worksheet I promise you, it will make everything else easier.

241

00:33:44.340 --> 00:33:53.220

Stephanie Bogan: But when we were talking about this, I was like Oh, this is the Jerry Maguire moment this is when we are like show me the money, not for the sake of the money, but when we are like.

242

00:33:53.460 --> 00:34:05.550

Stephanie Bogan: This is my thing this is what i'm going to do this is my main thing this is what it's all about and until you get that level of clear everything else gets harder truly.

243

00:34:06.210 --> 00:34:13.530

Stephanie Bogan: So it's not about the money for the sake of because if it's just about growing your revenue taking on clients and doing more.

244

00:34:14.010 --> 00:34:21.930

Stephanie Bogan: That will be what drives everything and you won't necessarily be satisfied if it's about creating success that is also satisfying.

245

00:34:22.650 --> 00:34:33.180

Stephanie Bogan: It serves the clients deeply and then you can get clear on the main thing and how you implement that it's going to be a lot easier Ben do you want to talk about number two because I know this is kind of your thing.

246

00:34:34.080 --> 00:34:45.030

Benjamin Brandt CFP®, RICP: i'm just too i'm sort of dwelling on you know Rambo is carrying an m 60 that's also an rpg I think that would kill the operator, so that must be an artist rendition, but that just distracted my attention.

247

00:34:45.570 --> 00:34:47.460

Benjamin Brandt CFP®, RICP: I am 60 was actually my issued weapon.

248

00:34:48.390 --> 00:34:50.520

Benjamin Brandt CFP®, RICP: When I when I served as a very, very long time ago.

249

00:34:51.000 --> 00:35:00.300

Benjamin Brandt CFP®, RICP: But, so the four phases, the first phase, the phase zero actually is, where I was, I think, when I started and I sort of refer to that as just flailing about in the void right.

250

00:35:00.540 --> 00:35:08.820



Benjamin Brandt CFP®, RICP: I had a podcast that was bringing me listeners, but I would approach each intro call I really didn't even have an intro call just expect them to sort of call me at some point right.

251

00:35:09.360 --> 00:35:12.570

Benjamin Brandt CFP®, RICP: And I would just sort of I would treat each process differently.

252

00:35:13.260 --> 00:35:17.940

Benjamin Brandt CFP®, RICP: which you know I thought it was just sort of creating custom services, giving each person their own unique thing.

253

00:35:18.300 --> 00:35:27.180

Benjamin Brandt CFP®, RICP: But in reality, I would have people that dropped off before the intro call or after after the first color after the second color they are, they would just sort of lose contact with them after I deliver the plan.

254

00:35:27.450 --> 00:35:31.230

Benjamin Brandt CFP®, RICP: I didn't have a written process right it just all handle each issue has to come.

255

00:35:32.040 --> 00:35:39.360

Benjamin Brandt CFP®, RICP: Which isn't going to work because you don't know what specific point you resonated with someone or what specific point you lost their interest.

256

00:35:39.540 --> 00:35:52.950

Benjamin Brandt CFP®, RICP: So the first thing I did is model and outcomes, I took stephanie's exact plan the six steps like want to process and I just took that to the market and it said i'm just going to get live feedback whatever calls come in and the treatment this exact way.

257

00:35:54.060 --> 00:35:56.460

Benjamin Brandt CFP®, RICP: rip off and deploy right of just putting that under the market.

258

00:35:56.760 --> 00:36:01.830

Benjamin Brandt CFP®, RICP: Phase three I can't I can't exactly see the bottom, but if you could just picture Patrick swayze is.

259

00:36:01.920 --> 00:36:14.490

Benjamin Brandt CFP®, RICP: muscly hairy arms wrapped around you right you're refining this process you're taking this model and you're making it your own right you're saying what is unique to my abilities what is unique to my process what specifically can I offer.

260

00:36:14.850 --> 00:36:21.330

Benjamin Brandt CFP®, RICP: And then, after you do that, so you take the model, you make it your own based on your unique skills and then that's when you're really going to see the hockey stick growth.

261



00:36:21.570 --> 00:36:24.660

Benjamin Brandt CFP®, RICP: So you're going to see some growth by doing it, the way that you're supposed to do it.

262

00:36:24.960 --> 00:36:35.850

Benjamin Brandt CFP®, RICP: But once you make it your own, then you definitely you're really going to see the hockey stick growth that's the speed i'd said their speed or speed to where you couldn't drop below 55 miles an hour, but that's when you really start to start to take off.

263

00:36:36.270 --> 00:36:40.170

Benjamin Brandt CFP®, RICP: So that's the four step process, even though randall is holding a made up like.

264

00:36:41.220 --> 00:36:44.730

Stephanie Bogan: I think I think you were actually supposed to show him like pulling me grenade right.

265

00:36:44.760 --> 00:36:45.900

Benjamin Brandt CFP®, RICP: Like to yes yeah.

266

00:36:45.930 --> 00:36:46.320

Stephanie Bogan: Which.

267

00:36:46.440 --> 00:36:47.970

Benjamin Brandt CFP®, RICP: I have tried don't.

268

00:36:48.330 --> 00:36:52.800

Stephanie Bogan: This is the, this is the deep intellectual stuff that we do behind the scenes to bring these calls to you.

269

00:36:52.800 --> 00:36:59.190

Stephanie Bogan: Ladies and gentlemen, about what movies, but but no truly but that we had a good laugh around the.

270

00:36:59.640 --> 00:37:08.010

Stephanie Bogan: Around the around the ghost when because right like ultimately when you talk about refining and rehearsing you get this really like tedious example of someone chopping wood or.

271

00:37:08.340 --> 00:37:17.250

Stephanie Bogan: You know, leaving or something like that and we thought this would be much more appropriate because remember our two standards here when we do anything or one does it work into does it feel good.

272

00:37:19.440 --> 00:37:24.990

Benjamin Brandt CFP®, RICP: And it's a good counter balance right between between swayze and Rambo you got it you got it you got to have both.



273

00:37:25.410 --> 00:37:30.180

Stephanie Bogan: going to have that was supposed to be funny, by the way you guys saw obviously need up my comedy training.

274

00:37:30.750 --> 00:37:40.110

Stephanie Bogan: Like when we think about doing the work it feels so tedious laborious and the idea is how do we get to a place where we really look at the refining and the rehearsing.

275

00:37:40.470 --> 00:37:50.640

Stephanie Bogan: As What helps us be successful, not some thing that we have to do that stands between us being successful so when Ben talks about taking it and using it.

276

00:37:51.840 --> 00:37:56.070

Stephanie Bogan: They understand that that's the gap that slows us down and I wrote this down.

277

00:37:56.460 --> 00:38:05.730

Stephanie Bogan: Because what I wrote is we can't wait for perfect, so I was talking with one of you a couple weeks ago and you're building out the perfect sales, you know this sales President that sales presentation.

278

00:38:06.120 --> 00:38:16.860

Stephanie Bogan: And if Ben had waited for the perfect sales presentation and would have never gotten the opportunity to perfect his sales presentation through the only art, I know, to one work 100% of the time which is practice.

279

00:38:17.610 --> 00:38:24.870

Stephanie Bogan: It is through taking the imperfect process how ever uncomfortable it might be applying it in the real world and going OK.

280

00:38:25.350 --> 00:38:33.990

Stephanie Bogan: i'm going to get 70% of the way there by starting they've given me everything I need to be successful, my job is to rate we give you permission rip off.

281

00:38:34.290 --> 00:38:40.320

Stephanie Bogan: deploy take the examples rebrand and like that's what you're here for like go forth and leverage.

282

00:38:40.680 --> 00:38:50.520

Stephanie Bogan: But do not believe for a second that you get to skip the work of weight putting it out there practicing it and then figuring out the right way to scale it, which again we'll talk more about the coming months.

283

00:38:50.790 --> 00:38:53.280



Benjamin Brandt CFP®, RICP: You will see success from rip off and deploy.

284

00:38:54.120 --> 00:39:01.470

Benjamin Brandt CFP®, RICP: The personal breakthroughs and a hockey stick growth will come after you or find that process, make it your own and read and read the play back to the market.

285

00:39:01.620 --> 00:39:16.740

Stephanie Bogan: it's helped all learning works which is first we get informed, and then we get educated right we have information, we know the information, then we become empowered which really means we own the learning.

286

00:39:17.790 --> 00:39:26.220

Stephanie Bogan: We own learning if someone called Ben right now, and so they have \$200,000 I would love you're an amazing advisor can I please, please, please work with you Ben would say without hesitation.

287

00:39:27.000 --> 00:39:32.820

Benjamin Brandt CFP®, RICP: i'm five more friends, no, I would say no, thank you, I remember for those kind of businesses away all the time right.

288

00:39:32.880 --> 00:39:39.090

Stephanie Bogan: Because he was so incredibly clear on what the impact of that decision is.

289

00:39:39.960 --> 00:39:45.060

Benjamin Brandt CFP®, RICP: And you can you can expand that to so many other places of your business do I know what my minimums are because I know.

290

00:39:45.300 --> 00:39:55.890

Benjamin Brandt CFP®, RICP: target revenue and how many hours a day, I want to work and because of doing this enough times, I know that every five clients that I bring on as two more days of search per year, I know I see four to five appointments a day during search time.

291

00:39:56.190 --> 00:40:05.130

Benjamin Brandt CFP®, RICP: So if I bring on well a million dollars in revenue or five \$200,000 accounts right that's the same revenue, but it's so much more work right it's more days in the office.

292

00:40:05.340 --> 00:40:13.740

Benjamin Brandt CFP®, RICP: So i'm not really solving i'm solving for one thing more hmm right that's April, but it's not the only goal it's I want to earn seven figures and I, and I only want to be in the office part time.

293

00:40:14.040 --> 00:40:21.720

Benjamin Brandt CFP®, RICP: I don't want to work more than 25 hours a week, well, so now i'm bringing on five 200,000 our clients i'm in direct competition with what i've stated that I want to set up to do.

294



00:40:21.960 --> 00:40:32.400

Benjamin Brandt CFP®, RICP: So that's why we have to go through these practices of learning about what we want to accomplish writing these things down taking Stephanie's model redefining it for ourselves, and then redeploy so this isn't just sort of.

295

00:40:33.000 --> 00:40:41.970

Benjamin Brandt CFP®, RICP: Playing off their real consequences at stake here, so you've got to know where you're going which which goes might become competing and conflicting and how you should run your practice.

296

00:40:42.690 --> 00:40:49.590

Stephanie Bogan: yeah I can ECHO ECHO right everything that Ben just said, but, as he said it, I have to admit I got really felt really proud for a minute.

297

00:40:50.070 --> 00:40:56.370

Stephanie Bogan: Because they just wrote, I was telling Ben at the beginning, I just finished up this one's column for investment news on keeping the main thing, the main thing.

298

00:40:57.120 --> 00:41:12.150

Stephanie Bogan: And, did you all hear how main thing been was I'm preaching now when he talked about that he was like if I take on two more one more client, that means one more meeting and surge days, which means like he was so clear on in service of what.

299

00:41:12.600 --> 00:41:17.580

Stephanie Bogan: That thing we tell ourselves I'll take the client I'll get the goal it'll feel good it's some revenue is better than no revenue.

300

00:41:17.970 --> 00:41:26.820

Stephanie Bogan: at the cost of oh wait my goal was to manage my time in this way, have all this time with my kids make this amount of money run the sufficient practice and he was like oh no not going to do it.

301

00:41:27.300 --> 00:41:31.830

Stephanie Bogan: Like it gives you that yardstick both for clients, but also for you, with the model practice.

302

00:41:32.220 --> 00:41:43.890

Stephanie Bogan: gives you what you need to do the hardest thing that you do in being successful, which is keeping the main thing, the main thing so much of our energy our focus our attention on our effort.

303

00:41:44.190 --> 00:41:48.900

Stephanie Bogan: Is distracted and diluted on 50 to 75% of things that do not move the needle.

304

00:41:49.650 --> 00:41:58.560

Stephanie Bogan: Not at all, which is why we give you the worksheets to get you through the process that's why we give you the examples to rip off and deploy so that you're not spending any energy.



305

00:41:59.100 --> 00:42:11.130

Stephanie Bogan: Like we're constantly sitting around thinking of ways to remove the resistance between you and the outcome is it a worksheet is the conversations, this is it that is too much right, how do we simplify it.

306

00:42:11.640 --> 00:42:19.890

Stephanie Bogan: that's your same job in your practice is one I love allison we're going to have to add phase zero floundering they should definitely put that on the slide.

307

00:42:20.520 --> 00:42:27.600

Stephanie Bogan: Right, are you clear on your on your model practice literally if you are not that is your main thing do not pass go do not.

308

00:42:28.110 --> 00:42:33.030

Stephanie Bogan: Pass go do not collect your \$200 call me right away, we got to get this off period into conversation.

309

00:42:33.900 --> 00:42:43.350

Stephanie Bogan: right if you're in launch go and try, I will be there, we will support like you have to get clear to once you're clear, you know what your priorities can be right that's the big levers worksheet.

310

00:42:43.950 --> 00:42:53.340

Stephanie Bogan: which I think I show you here in short order, like what are the places, you are going to most move the needle right now, not everywhere so rip off and deploy their refined in reverse there.

311

00:42:53.670 --> 00:43:00.990

Stephanie Bogan: Get traction there ramp it up lather rinse repeat right don't do 15 things at once, so where there's all these things that keep us.

312

00:43:01.320 --> 00:43:06.540

Stephanie Bogan: from being effective and you're catching lots of them in the calls, you know some that we've covered some that are coming up.

313

00:43:06.930 --> 00:43:13.800

Stephanie Bogan: But the main thing is to keep the main thing, the main thing, and you hear that in ben's conversations, he is so locked on.

314

00:43:14.100 --> 00:43:20.520

Stephanie Bogan: To that million dollar hundred a practice here's what it's going to take if it does not support that it does not get to stay.

315

00:43:21.030 --> 00:43:26.220



Stephanie Bogan: And he's done an incredible job of that which is why he's got the efficiency and the advocacy and the focus.

316

00:43:26.520 --> 00:43:36.360

Stephanie Bogan: Now we need to focus on right creating the competence that the systems and the staff can support that while he's gone for six weeks, which I am absolutely confident that we can and one year from now we will be having that conversation.

317

00:43:37.860 --> 00:43:42.330

Stephanie Bogan: yeah that's what you do when you're a coach you hanging out there right one year from now Bam you got everybody ben's two.

318

00:43:43.140 --> 00:43:54.630

Stephanie Bogan: weeks off alright, so are you clear on the value of getting clear ripping off whatever you can from wherever you can relate it to the main things you're working on right now.

319

00:43:55.170 --> 00:43:58.560

Stephanie Bogan: refine and rehearse the heck out of those things and then.

320

00:43:59.040 --> 00:44:08.940

Stephanie Bogan: just keep doing it until you just nail it to the point that it's a habit habit is something that you do in voluntarily without thinking been business think about is prospect conversation I promise you, is like Oh, I have a prospect coming up.

321

00:44:09.510 --> 00:44:19.500

Stephanie Bogan: I really get ready for this one he knows now he just knows it's automatic behavior because he's practice his write his intellectual muscle memory.

322

00:44:19.980 --> 00:44:34.560

Stephanie Bogan: So that's your job just follow those four steps you do that picking one or two things at a time you're going to be more than able to get the price of admission in a year hands down with our question if you're not then it means you're not doing one of those things all right.

323

00:44:35.880 --> 00:44:43.590

Stephanie Bogan: Ben let's talk a little bit about how you put that value into play and i'll actually pause there if you guys allison do we have any questions and slide Oh, I want to make sure.

324

00:44:45.990 --> 00:44:47.850

Limitless Adviser: It doesn't look like we do yet okay.

325

00:44:47.940 --> 00:44:58.320

Stephanie Bogan: yeah as you guys have questions as we go along, I said as not if, by the way, notice that, as you have questions as we go along feel free to drop them in slide oh and allison will make sure that Ben or I get them



answered.

326

00:44:59.880 --> 00:45:00.330

Stephanie Bogan: right then.

327

00:45:01.680 --> 00:45:11.580

Benjamin Brandt CFP®, RICP: So earlier in the slides we talked about you know if you don't provide the client with context they're going to provide their own context and it might not be flattering right well here's a great example of.

328

00:45:12.000 --> 00:45:16.830

Benjamin Brandt CFP®, RICP: Something that I delivered on Thursday and I just had the client agreed agreed to come on as a client.

329

00:45:17.310 --> 00:45:25.170

Benjamin Brandt CFP®, RICP: right before he logged onto this call now what's important that I want you to notice is this this pretty little graph right here is the exact same graph that.

330

00:45:25.380 --> 00:45:31.830

Benjamin Brandt CFP®, RICP: Any financial advisor on earth is going to show their claims the same Monte Carlo analysis, down to the colors of the individual bars that.

331

00:45:32.130 --> 00:45:37.740

Benjamin Brandt CFP®, RICP: The Green is income, the blue is portfolio withdrawals in the yellow screen it's the exact same thing.

332

00:45:38.100 --> 00:45:43.860

Benjamin Brandt CFP®, RICP: So if i'm showing this to a client without the context of what makes me special my queen bee role they're going to say.

333

00:45:44.100 --> 00:45:53.700

Benjamin Brandt CFP®, RICP: This this advisors exactly the same as every other advisory back to go to fidelity's website and I generated this exact proposal for free, I went to vanguards website either personal capital, you name it.

334

00:45:53.940 --> 00:45:59.310

Benjamin Brandt CFP®, RICP: for free, so if i'm showing them this without the proper context i'm reinforcing in their mind that i'm overpriced.

335

00:45:59.730 --> 00:46:03.000

Benjamin Brandt CFP®, RICP: Because we're just going to go straight to the lowest common denominator which is price.

336



00:46:03.480 --> 00:46:18.120

Benjamin Brandt CFP®, RICP: So I needed I need to, and we all have the same tools and all have access to the same tools right is probably if we pulled everybody there's 100 advisors we're all using the same four pieces of software right so you've got to initially do the work of what makes you special right now.

337

00:46:22.650 --> 00:46:31.740

Benjamin Brandt CFP®, RICP: rewind about a year ago I was trying to refine this whole process and the two questions that I thought were the most valuable to me where I do blank and others don't.

338

00:46:32.190 --> 00:46:34.650

Benjamin Brandt CFP®, RICP: or I don't do blank and others do.

339

00:46:35.100 --> 00:46:42.120

Benjamin Brandt CFP®, RICP: answer those two questions you can answer both of them, or you can answer either one of them, it should get you in the same place comparing yourself to your peers.

340

00:46:42.300 --> 00:46:52.530

Benjamin Brandt CFP®, RICP: and find out what makes you special, so I do income taxes and others don't I don't do test prep to do tax advice and others don't why might that be now you don't need to tell the client this, but you need to have this exercise in your mind.

341

00:46:52.830 --> 00:46:59.670

Benjamin Brandt CFP®, RICP: Well, they work for a big warehouse or brokerage firm and they can't do taxes, because of X reason there's compliance reasons and also the thing so.

342

00:46:59.940 --> 00:47:04.290

Benjamin Brandt CFP®, RICP: boy I know that that's a fantastic competitive advantage for me and a way that I can really demonstrate.

343

00:47:05.160 --> 00:47:13.170

Benjamin Brandt CFP®, RICP: contextual value well in excess of my feet, which we'll talk about when we look at this chart in more detail or I don't do blank and others do.

344

00:47:13.530 --> 00:47:22.500

Benjamin Brandt CFP®, RICP: I don't talk about safe withdrawal rates right 3% see if it's right for 4% 1.25% safe withdraw it, I don't talk about any of that because I don't believe in it.

345

00:47:22.800 --> 00:47:33.240

Benjamin Brandt CFP®, RICP: And we talked a lot about it on my show and all my prospects come to me through the show, so I talked about dynamic withdrawal rate that's your guard rails right I don't do safe withdrawal rates and others do i'm.

346

00:47:33.990 --> 00:47:42.720



Benjamin Brandt CFP®, RICP: Clear cutting a very specific differentiator between myself and everyone else Fisher investments definite doesn't do this vanguard definitely doesn't do this.

347

00:47:43.110 --> 00:47:53.130

Benjamin Brandt CFP®, RICP: If you visit with someone that talks with Fisher vanguard, you can say Oh, the last time they look at your income taxes, what software, do you use to collect your income taxes or what advice, do they give you around xyz tax thing.

348

00:47:53.370 --> 00:47:57.060

Benjamin Brandt CFP®, RICP: they're going to say they don't collect my income taxes right which is a great a great differentiator.

349

00:47:57.810 --> 00:48:03.780

Benjamin Brandt CFP®, RICP: So my value proposition is taxes and guardrails so you need to ask ask and answer those two questions of yourself.

350

00:48:04.470 --> 00:48:10.560

Benjamin Brandt CFP®, RICP: And I think that's going to provide a lot of context as to what makes you special so we're taking stephanie's process.

351

00:48:10.770 --> 00:48:22.650

Benjamin Brandt CFP®, RICP: we're applying what specifically makes us special we're redeploying that process and then at every given opportunity, whether that's in our intro call the emails that we send after the intro call which I could get to the team, if they want to look at those.

352

00:48:22.920 --> 00:48:29.640

Benjamin Brandt CFP®, RICP: All of those instances point back to us as to what makes us special so we're just constantly reinforcing that at any given opportunity.

353

00:48:30.270 --> 00:48:36.300

Benjamin Brandt CFP®, RICP: So, looking at at the sheet here the plan the exact same plan that that any other advisor on earth is presenting to a client.

354

00:48:36.570 --> 00:48:45.090

Benjamin Brandt CFP®, RICP: We have to provide context of what makes what we're doing special and how that's valuable to the client right features and benefits so we've got Jim and Pam here that's fake names.

355

00:48:45.870 --> 00:48:51.360

Benjamin Brandt CFP®, RICP: Now I presented this plan on Thursday, they said yes, an hour and 48 minutes ago, so this is as fresh as it gets.

356

00:48:51.750 --> 00:49:00.660

Benjamin Brandt CFP®, RICP: But Jim and Pam their average age for new clients for us their average maybe a little



bit above average in assets and their average maybe a little bit average above any income.

357

00:49:01.230 --> 00:49:06.600

Benjamin Brandt CFP®, RICP: And so, if i'm not providing them the proper context they probably think well, I have a \$3 million retirement.

358

00:49:07.170 --> 00:49:14.970

Benjamin Brandt CFP®, RICP: Or, I have a \$200,000 retirement income goal right that's the context that they're that they're framing their plan in probably the same context, that every advisor is.

359

00:49:15.390 --> 00:49:23.250

Benjamin Brandt CFP®, RICP: But since I know that retirement income guardrails and taxes are my unique value proposition mcqueen viewer all I could say, Mr Mrs client.

360

00:49:23.970 --> 00:49:29.190

Benjamin Brandt CFP®, RICP: You can see here if we add up all these cash flows into the fidelity's retirement income evaluator it's a free tool.

361

00:49:29.460 --> 00:49:35.310

Benjamin Brandt CFP®, RICP: That they probably have access to their fidelity customers, because as a some of the customers with with fidelity have the same platform.

362

00:49:35.550 --> 00:49:40.800

Benjamin Brandt CFP®, RICP: If we total up all these castles we've got a \$3.7 million lifetime income of cash flows.

363

00:49:41.070 --> 00:49:48.060

Benjamin Brandt CFP®, RICP: And then, according to this analysis you're you're on track i've got a \$13 million surplus, so what I see is a \$15 million retired.

364

00:49:48.360 --> 00:49:53.550

Benjamin Brandt CFP®, RICP: Would you agree, Mr Mrs client well yeah I agree, you know, out of all the cash flows out of the surplus but \$15 million retirement.

365

00:49:54.120 --> 00:49:56.310

Benjamin Brandt CFP®, RICP: Okay, so we just reviewed your income taxes.

366

00:49:56.850 --> 00:50:03.990

Benjamin Brandt CFP®, RICP: What would you say if we had a 10% effective tax rate on \$15 million, what would that mean to you and cost wants to \$1.5 million bill.

367

00:50:04.170 --> 00:50:08.370



Benjamin Brandt CFP®, RICP: Well that's probably the biggest bill, you have to pay in retirement, would you agree, all that definitely big still.

368

00:50:08.670 --> 00:50:17.130

Benjamin Brandt CFP®, RICP: Well, we just reviewed you've got a 17% effective tax rate today what if you had a 20% effective tax or would that mean well it's a \$3 million lifetime tax bill.

369

00:50:17.490 --> 00:50:23.820

Benjamin Brandt CFP®, RICP: Well, excellent so if we could show you ways just a sand off the rough edges of a \$3 million tax bill, what would that mean to you.

370

00:50:24.030 --> 00:50:29.760

Benjamin Brandt CFP®, RICP: Well, that means several hundred thousand whatever they're going to say so and we've already talked about fees and they understand this in the context right.

371

00:50:30.030 --> 00:50:34.830

Benjamin Brandt CFP®, RICP: So i'm showing them the exact same financial plan everyone else's but i'm because I know it makes me unique.

372

00:50:35.040 --> 00:50:45.630

Benjamin Brandt CFP®, RICP: we're having a totally different conversation using the same software everyone else does so they say i've got a \$3 million bill if then control me one or two things over 30 years he's going to deliver well in excess of his fee.

373

00:50:46.110 --> 00:50:52.680

Benjamin Brandt CFP®, RICP: So that's the conversation, you need to have, but you can't have it until you answer one question two ways I do blank and others don't.

374

00:50:52.950 --> 00:51:04.860

Benjamin Brandt CFP®, RICP: or I don't do blank and others do and answer those two questions you'll be able to take the exact same financial plan and you'll be able to to really demonstrate contextual value to those clients that it'll in ways that you've never thought you could.

375

00:51:05.340 --> 00:51:15.420

Stephanie Bogan: And here's the beautiful addendum to that if you really, really break it down what the way that Ben is packaging, the value he adds is what answers those questions.

376

00:51:15.780 --> 00:51:21.870

Stephanie Bogan: Not necessarily as he pointed out the tools are the technique with which she chose to do it.

377

00:51:22.410 --> 00:51:31.950

Stephanie Bogan: Those things are great things that olivia can do and Adam can do and Ted can do and Mary can do with the same software again not accounting for age and experience and wisdom and those things.



378

00:51:32.370 --> 00:51:40.380

Stephanie Bogan: But when we get to the place and notice, this is what Ben said to the client i'm going to point this out because it's a technique that you can use.

379

00:51:40.710 --> 00:51:44.550

Stephanie Bogan: that's super valuable it's a form of seeding which is right, where you're sort of.

380

00:51:44.820 --> 00:51:55.050

Stephanie Bogan: Creating an idea that their brain can latch on to if it doesn't meet with any strong opposition, which means unless you're being ridiculous they're probably going to be like Okay, and that is what does this mean.

381

00:51:55.590 --> 00:52:06.570

Stephanie Bogan: He said that how many times, what does this mean, because when we talk in percentages and things of that nature, our brains here marshmallows literally they just hear want want want Charlie brown mom.

382

00:52:06.930 --> 00:52:13.290

Stephanie Bogan: When we say what does that mean to you the brain has to do the quick processing and go, and that means 1.5 million or 3 million, I mean the kids can.

383

00:52:13.530 --> 00:52:25.800

Stephanie Bogan: Go to college or It means that i'll be able to retire at 60 instead of 75 like it means whatever is important to them and then you'll notice he brings it home with what does that mean to you.

384

00:52:26.730 --> 00:52:35.280

Stephanie Bogan: So just the sheer act of asking the questions, what does it mean is a forcing mechanism for their brain to catalog and re put the value in that container.

385

00:52:35.700 --> 00:52:45.270

Stephanie Bogan: What does it mean to you requires them intuitively to translate it either numerically or from a right and it more of an intangible value base.

386

00:52:45.630 --> 00:53:03.900

Stephanie Bogan: into the value that they can expect to get which makes the decision to work with you an awful lot easier does that make sense, do you guys see how kind of our best practices, work and then how Ben is truly taking that and putting it in practice to create his version of the proven practice.

387

00:53:05.460 --> 00:53:06.540

Stephanie Bogan: noddng, yes, good.

388

00:53:08.160 --> 00:53:08.400



Stephanie Bogan: I was.

389

00:53:08.790 --> 00:53:11.010

Stephanie Bogan: Just those of you who aren't on video because i'm watching you.

390

00:53:11.010 --> 00:53:11.880

Stephanie Bogan: So I was checking in.

391

00:53:12.000 --> 00:53:16.560

Benjamin Brandt CFP®, RICP: This this guided discovery is so important, you know I think as advisors, we really.

392

00:53:16.920 --> 00:53:23.310

Benjamin Brandt CFP®, RICP: downplay our knowledge level, and you said well Ben effective tax rates, I mean that's one way, you can do that on the back of a napkin.

393

00:53:23.700 --> 00:53:32.820

Benjamin Brandt CFP®, RICP: Our clients have not done the one on one stuff that's what one of the things that makes us special as advisors, so you have to have this guided discovery, if you just say hey client your effective tax rate is 70%.

394

00:53:33.210 --> 00:53:37.650

Benjamin Brandt CFP®, RICP: they're going to say who cares right, but if you go through, and you and you show them, you know.

395

00:53:38.130 --> 00:53:47.100

Benjamin Brandt CFP®, RICP: And i'm just i'm doing incorrect math that's rounded right i'm just take \$1.5 million dollars something \$3 million right, what does that mean to you have them do that easy math with you as you go along.

396

00:53:47.370 --> 00:53:50.670

Benjamin Brandt CFP®, RICP: To guided discovery we're learning this together, I obviously know it, I.

397

00:53:51.030 --> 00:53:56.400

Benjamin Brandt CFP®, RICP: Created the plan I reviewed their income taxes i've done dozens and dozens of these, but this is their first time.

398

00:53:56.580 --> 00:54:03.330

Benjamin Brandt CFP®, RICP: So this is their one on one or or even a prerequisite to that so we're having this guided discovery where we're figuring this out together, so if I just.

399

00:54:03.690 --> 00:54:12.570

Benjamin Brandt CFP®, RICP: printed on a one page one, if you have a \$3 million lifetime tax bill they're just going to



kind of gloss right over that, but if you contextualize it and you think of that together and they.

400

00:54:12.990 --> 00:54:15.420

Benjamin Brandt CFP®, RICP: picture in their mind the \$3 million tax well now it's a real number.

401

00:54:15.750 --> 00:54:27.270

Benjamin Brandt CFP®, RICP: So now, when I say what if we could stand off the rough edges that \$3 million they're saying well that's probably three \$300,000 or maybe it's 600,000 or maybe it's you know, whatever it is, and then they'll be able to compare that to my fiance while this is a bargain.

402

00:54:30.270 --> 00:54:33.090

Stephanie Bogan: And Bam I noticed you you commented, which I think is very.

403

00:54:33.450 --> 00:54:40.980

Stephanie Bogan: Good and noticing is that he should be am also notice that Ben is very frequently asking, do you agree, would you agree that this is good, do you agree.

404

00:54:41.250 --> 00:54:48.690

Stephanie Bogan: Right so again, our brain is being kind of quietly asked you know, are we on the same track here are we on the same page, are we using the same yardstick yes.

405

00:54:49.140 --> 00:54:55.230

Stephanie Bogan: By the time that someone comes in for learn more call right listens to Ben comes in for learn more call and sits down with him.

406

00:54:55.590 --> 00:55:04.620

Stephanie Bogan: The war you the odds are 95 should be 95% that are going to work with you, if they're lucky right as they as the truth is if they're 95% record, we need to raise your fees.

407

00:55:04.980 --> 00:55:10.650

Stephanie Bogan: But, in general, if you're closing rate is not 80% or better than you have work to do on the sales presentation.

408

00:55:11.070 --> 00:55:16.380

Stephanie Bogan: If it is 80% or, better, it may not be the main thing you can definitely get it up, but.

409

00:55:16.800 --> 00:55:24.720

Stephanie Bogan: I want to give you guys that context in terms of what Ben is continuously doing, which is something that I built into the advice process that we.

410

00:55:25.080 --> 00:55:32.490



Stephanie Bogan: That we built out at united capital, which is the whole right the underpinning of money lines and honest conversations and personal life management is this.

411

00:55:33.060 --> 00:55:43.170

Stephanie Bogan: Involvement equals investment when you engage the client in the process to finding the value, asking them those questions getting their agreement.

412

00:55:43.560 --> 00:55:53.700

Stephanie Bogan: Making sure that they're clear on how to measure it asking them if they agree all of those things engage them in an interactive process which is entirely different.

413

00:55:54.150 --> 00:56:04.770

Stephanie Bogan: than a command and control process, which is how planning, quite honestly, used to be right 15 years ago you went to your financial advisor or your doctor you they assess you and they said here's what's wrong here's what you need to do.

414

00:56:05.400 --> 00:56:11.580

Stephanie Bogan: Now, if I go to my doctor my doctor will not tell me that my doctor will say here's what's going on here are the options.

415

00:56:11.880 --> 00:56:16.470

Stephanie Bogan: Please take some time with family just guess what you want to do, and let me know right it's much more.

416

00:56:16.770 --> 00:56:27.540

Stephanie Bogan: And our research my research united really reinforce this is the best relationships in terms of creating that trusted advisor status or actually ones with the client is involved.

417

00:56:28.320 --> 00:56:42.150

Stephanie Bogan: As a participant in the decision making process, not one where you act as the Patriarch or matriarch of their financial family and tell them what to do, and you hear that in ben's conversation consistently.

418

00:56:44.640 --> 00:56:46.590

Benjamin Brandt CFP®, RICP: Actually, this important this is so important.

419

00:56:46.920 --> 00:56:49.770

Benjamin Brandt CFP®, RICP: When you're delivering this virtually when you're delivering this over zoom.

420

00:56:49.980 --> 00:56:57.780

Benjamin Brandt CFP®, RICP: This has to be a guided discovery where you're figuring this out together does this make sense to you do, you see, you know and you're getting you're seeing you're nodding your understanding back and forth.



421

00:56:57.960 --> 00:57:04.500

Benjamin Brandt CFP®, RICP: If i'm just presenting a plan it's totally different in person, because you're feeling the body language there in your office right you're the leader.

422

00:57:04.680 --> 00:57:07.890

Benjamin Brandt CFP®, RICP: i'm in their living room right, I met their kitchen table when i'm on zoom.

423

00:57:08.100 --> 00:57:18.510

Benjamin Brandt CFP®, RICP: Right i'm in i'm in their turf So this has to be a guided thing that we're doing together not here's this big this big binder you know that's gold gilded and i'm handing it to you right from a from.

424

00:57:18.810 --> 00:57:25.680

Benjamin Brandt CFP®, RICP: Top model of this right, this is a totally different thing when you're delivering it virtually so it really has to be done, I think, in this specific way.

425

00:57:26.790 --> 00:57:33.570

Stephanie Bogan: and Chris I don't know if you're on the call I know you're you and a number of other people are working on the sales presentation even advance of the prospect process.

426

00:57:33.960 --> 00:57:42.210

Stephanie Bogan: And you know I went on tribe, and I literally posted like three different like detailed versions of sales presentations questions different things that you could reference.

427

00:57:42.510 --> 00:57:52.140

Stephanie Bogan: And if some of you access that the goal wasn't that you are going to get through all of those things in 16 minutes, because if you do it will be a marathon and for sprint to the meeting, and they will be very influential.

428

00:57:52.470 --> 00:57:57.330

Stephanie Bogan: it's I shared those things to give Chris and all of you who are looking at that on tribe.

429

00:57:57.660 --> 00:58:04.170

Stephanie Bogan: a frame of reference for what isn't a good sales presentation what kinds of questions you can ask for the to ben's point.

430

00:58:04.500 --> 00:58:14.910

Stephanie Bogan: You can rip off and deploy cherry pick the questions that feel right to you follow the process and start to figure out hey you know what these questions really work for me these questions really don't.

431

00:58:15.510 --> 00:58:26.250

Stephanie Bogan: I am not giving you anything that has not been proven to work in a multitude of firms, but that does not mean that is perfect, to you, I can give you an amazing suit we still got a custom tailor fit it to you.



432

00:58:26.520 --> 00:58:36.870

Stephanie Bogan: To ben's point that's the part where you start to own it and you get confident and that is all a function of defining and practicing it so hopefully that walkthrough of how to turn this story.

433

00:58:37.470 --> 00:58:45.750

Stephanie Bogan: into real value in the sales presentation and right and then we're going to talk much more at the May retreat about the actual process process you didn't miss anything.

434

00:58:46.140 --> 00:58:57.810

Stephanie Bogan: And the sales presentation and the service model to deliver on it, but we really wanted to use this time as a bridge to get you really clear on the importance of telling your story and how you have to back that up.

435

00:58:58.200 --> 00:59:03.900

Stephanie Bogan: In how you package, it for the prospect conversation and, ultimately, how you deliver it is that helpful to you, oh.

436

00:59:05.400 --> 00:59:05.640

Benjamin Brandt CFP®, RICP: Yes.

437

00:59:06.090 --> 00:59:23.520

Stephanie Bogan: Okay, all right so take a pause That was a lot really good stuff that if you absorb 10% of it news you're going to be better off when I want to take like a brain break because that was a lot, I want to check in with allison do we have some questions looks like we do.

438

00:59:23.760 --> 00:59:25.530

Limitless Adviser: You have two questions yeah.

439

00:59:26.700 --> 00:59:35.670

Limitless Adviser: One is from john about the coaching path, which I think you'll go into at the end of the call the other was just from Chris he wants to know those three questions you just mentioned Ben.

440

00:59:36.690 --> 00:59:41.160

Limitless Adviser: The second one, was what does it mean and the last one was what does it mean to you what was the first one.

441

00:59:45.390 --> 00:59:46.440

Stephanie Bogan: I think there were, I think there were.

442

00:59:46.440 --> 00:59:55.800

Stephanie Bogan: Just, which is what does it mean he said a lot and then he backed it up with the tail end of that is



then getting them to translate into what all that means to them.

443

00:59:56.520 --> 01:00:05.070

Benjamin Brandt CFP®, RICP: you're getting buying what whenever you can't you know you're not telling them, this is what you need, and this is how I offer right you want to discover that together.

444

01:00:05.730 --> 01:00:14.610

Benjamin Brandt CFP®, RICP: So what What if what if you had a 10% of effective tax rate in retirement on a on a \$15 million plan, what would that mean well, most people.

445

01:00:15.420 --> 01:00:22.920

Benjamin Brandt CFP®, RICP: These two third just deliver they're both engineers, so I knew that they could do that math in their head \$1.5 million Okay, what if it's if it's 20%.

446

01:00:23.250 --> 01:00:29.220

Benjamin Brandt CFP®, RICP: Okay double that number right i'm I know they can do this math in their head or i'm going to help them out if they can i'm not gonna put them on the spot, but.

447

01:00:29.670 --> 01:00:36.570

Benjamin Brandt CFP®, RICP: So we're figuring this out together obviously under the answers at a time, but they don't so we're discovering this together might seem silly.

448

01:00:36.810 --> 01:00:45.660

Benjamin Brandt CFP®, RICP: If you're a CFA CPA CFP, you could do this in your sleep, but your clients aren't that that's why they're in front of you so you're helping them discover this to get a guided discovery.

449

01:00:48.720 --> 01:01:00.960

Stephanie Bogan: So what I want you guys to do or take the opportunity to do is understand that there's a lot to process there there's a lot that you can do there's a lot and telling your story and niches and values and goals and all of those things.

450

01:01:01.440 --> 01:01:11.430

Stephanie Bogan: But we are also coming up on the end of the third on the first quarter or third month, which means bill Pam Aaron Liz John Pam Spencer Susan John.

451

01:01:11.910 --> 01:01:19.710

Stephanie Bogan: is time for the awareness on it and the awareness audit is there's a lot of great stuff out there, I can capitalize Lou is it Pam just said.

452

01:01:20.100 --> 01:01:30.630

Stephanie Bogan: So, but this is not my first time drinking for this deputy and Ben fire hose right you're going to feel like that a lot because there's so much you can do here and your brain wants to suck it all up and do it all.



453

01:01:31.710 --> 01:01:44.970

Stephanie Bogan: And what you're learning is keep the main thing the main things that you can focus on the things that will move the Needle, and you will get your price of admission and then some which starts with the awareness on it, the awareness on it, one, are you focused on the main thing.

454

01:01:45.570 --> 01:01:52.080

Stephanie Bogan: Are you clear on what your main thing is your main thing isn't necessarily one thing like your main thing bill could be.

455

01:01:52.680 --> 01:02:01.650

Stephanie Bogan: It was just writing about this right, I want to build that million dollar practice with 100 days off I want 30 hours a week, and I want to serve a select group of 100 clients efficiently profitably enjoyably.

456

01:02:02.190 --> 01:02:05.220

Stephanie Bogan: that's very different than I want to stop being overwhelmed and grow my revenue when.

457

01:02:05.220 --> 01:02:08.160

Stephanie Bogan: It comes to write your awareness discerning.

458

01:02:08.640 --> 01:02:15.000

Stephanie Bogan: What supports the Wayne thing and what distracts us from the main thing our daily demands are distractions all of that towards us.

459

01:02:15.390 --> 01:02:24.660

Stephanie Bogan: When we're clear on what the main thing is it puts us in a position to ask to really valuable questions, one is what i'm doing in service of my goal.

460

01:02:25.470 --> 01:02:37.050

Stephanie Bogan: is taking one of you called me last week set new goals cannot make this stuff up set new goals all right i'm ready i'm like loaded called me and said, I have a really motivated prospect that doesn't mean my minimum should I take this person.

461

01:02:38.640 --> 01:02:41.940

Stephanie Bogan: what's the answer what's The obvious answer that question to everyone on this call.

462

01:02:43.350 --> 01:02:50.190

Stephanie Bogan: Know gives like no but I swear half of you, if it were you you'd be calling me with the same questions, not because you don't know the answer.

463

01:02:51.060 --> 01:02:58.860

Stephanie Bogan: To be clear about this, not because you don't know the answer if you're here you do, but because you are grappling with a discomfort.



464

01:02:59.220 --> 01:03:10.230

Stephanie Bogan: That following through on that decision will bring your fear of what goes wrong, your fear of missing out on that great growth opportunity because you can't just squeeze it and all of that stuff.

465

01:03:10.650 --> 01:03:16.830

Stephanie Bogan: Is all awareness, we think it's strategy we think it's focus, we think it's all of this, it is all about our awareness.

466

01:03:17.340 --> 01:03:25.410

Stephanie Bogan: Are we clear on what we're doing and why we're here are we clear on the main things right, what we need to do, personally and professionally to be happy.

467

01:03:25.740 --> 01:03:30.450

Stephanie Bogan: Healthy and fulfilled because 80% of what we do, does not support those aims, ladies and gentlemen.

468

01:03:30.990 --> 01:03:38.580

Stephanie Bogan: The awareness audit says, I got to shift my thinking to shift my life if you are here, and you have not figured out by now please call me immediately straight away.

469

01:03:39.210 --> 01:03:45.270

Stephanie Bogan: Right, how is a whole nother story we've got the whole year to work it out, but step one always always get clear.

470

01:03:45.540 --> 01:03:51.810

Stephanie Bogan: On what standing between you and the change right that's the first worksheet you see to get clear on where you're above the line and below the line.

471

01:03:52.650 --> 01:04:01.020

Stephanie Bogan: you've heard me talk about this a lot right are you in that success empowered i'm focused on the main thing, and I am not distracted by everything else, because everything I need is here and it's figure out audible.

472

01:04:01.590 --> 01:04:12.720

Stephanie Bogan: Or are you in that stressed and struggling feeling like I got to do it all and stephanie and Ben and paddling they've all talked about 50 billion I gotta do them all know it took you two years or 20 years to create the situation that you came here to solve.

473

01:04:13.020 --> 01:04:25.410

Stephanie Bogan: We are not going to fix it in 60 days we're not that's the honest answer can we fix it in a year we make massive progress absolutely can we change your life in two or three without question.

474



01:04:26.220 --> 01:04:28.800

Stephanie Bogan: Without Craig we've done it once but I like to be you know reasonable.

475

01:04:29.400 --> 01:04:37.890

Stephanie Bogan: It will not happen unless you get really clear on what's holding you back, which is what that seven mindsets worksheet is intended to do, like when I think about my worth.

476

01:04:38.250 --> 01:04:47.550

Stephanie Bogan: And my clarity and my money and charging like what really comes up for me, and is it standing between me and taking action so that's what all of those tools are for.

477

01:04:48.120 --> 01:04:57.990

Stephanie Bogan: It is easy to discount this part of the work yeah it's great I love that Stephen and stuff stephanie talks about I actually had someone you guys will get a kick out of this someone said to me last year hey.

478

01:04:58.740 --> 01:05:05.310

Stephanie Bogan: I love what you guys are doing i'm super big fan of the systems, do you think you could dial down the inspiration just a little.

479

01:05:06.600 --> 01:05:07.230

Stephanie Bogan: And I said.

480

01:05:08.340 --> 01:05:11.880

Stephanie Bogan: Like how much, and he said, like to zero.

481

01:05:13.020 --> 01:05:15.600

Stephanie Bogan: i'm not kidding it's me I thought look.

482

01:05:16.020 --> 01:05:17.010

John Chitaley: Why was he there are.

483

01:05:17.700 --> 01:05:22.320

Stephanie Bogan: Well, he wanted the systems right order to fit in great and I totally get that and I said okay.

484

01:05:23.160 --> 01:05:37.710

Stephanie Bogan: here's The funny part I cannot do, I cannot make this stuff up Do you know what he said to me in his next breath, he said to me now, having said that, I want to tell you that the big firm that I work with should fire all of their coaches and hire you guys because you're way better.

485

01:05:40.350 --> 01:05:40.710

Okay.



486

01:05:42.090 --> 01:05:46.890

Stephanie Bogan: What we really have here is a disconnect between the awareness that we're creating.

487

01:05:48.240 --> 01:05:57.210

Stephanie Bogan: And then the idea that it's a lot more than systems and that for this person my guesses rate creates a lot of discomfort that you know ready you're not to deal with that you're all here, because you are.

488

01:05:57.900 --> 01:06:04.590

Stephanie Bogan: If you're not please let me know you'll need to dial the inspiration down to zero, I have some groups, I can recommend to you this is not that group.

489

01:06:04.860 --> 01:06:14.340

Stephanie Bogan: Not because inspiration is fun, but because it's what gets you in the state to get clear on what really matters that you will down will move the needle in the way that you need to move it that's why we do it.

490

01:06:14.850 --> 01:06:26.250

Stephanie Bogan: If I just go hey the business, research, says that if you do this and you do, that things will be better you'll be like want want line on care, like my job is to be your chief possibility officer bench job in this call is to show you what happens when you do.

491

01:06:26.970 --> 01:06:36.840

Stephanie Bogan: That starts with awareness Ben got really clear and you've heard him say it in 17 different ways that what he was doing was not working for him and he was willing to be.

492

01:06:37.590 --> 01:06:44.280

Stephanie Bogan: To do the thing that will make you successful, which is subject yourself to discomfort over and over and over again in a really good way.

493

01:06:45.120 --> 01:06:49.020

Stephanie Bogan: Alright, so if you have not gone through some of these exercises or even if you have.

494

01:06:49.680 --> 01:07:01.050

Stephanie Bogan: This is a really good time to go back review them, but in particular go through them with the clarity of what is the main thing what's that model practice and what are the things that you need to focus on this year and, in particular, as we face quarter to.

495

01:07:01.470 --> 01:07:07.500

Stephanie Bogan: What are the things you need to be really clear on so you can pick the main thing to put on your roadmap for change this quarter.

496

01:07:08.100 --> 01:07:17.460



Stephanie Bogan: It will always end up being in one of these three categories strategy story or stage strategy, I need to write Ben de redefine his conversion process right is legion process.

497

01:07:18.180 --> 01:07:28.110

Stephanie Bogan: story was he had to get into the place where he believed that right he could do that, that he could raise the client profile that he could do the things that you need to do, and he needed to be in an empowered state.

498

01:07:28.530 --> 01:07:34.950

Stephanie Bogan: Right, he did you be comfortable ripping off and deployment you needed to have the time you need to have the mental focus to implement those changes.

499

01:07:35.460 --> 01:07:46.380

Stephanie Bogan: If you're stuck struggling stalled, even if you're just stressed out trying to simplify it is this triangle that you can always come to to figure out what's really happening.

500

01:07:47.340 --> 01:07:56.340

Stephanie Bogan: what's really happening, I used it this morning, yesterday I was like oh i'm really stuck writing this article what's the article on the main thing should have been an easy knockout right.

501

01:07:56.610 --> 01:08:01.410

Stephanie Bogan: But I didn't start it from a focused and fired said it was like oh I gotta get this done I sat down and I was like.

502

01:08:02.160 --> 01:08:16.470

Stephanie Bogan: I have nothing to say I don't know why they asked me to write this column, nobody wants to hear any of this and I read the same thing five different ways and deleted all of it after six hours, I had 265 words is that remotely efficient, effective or enjoyable.

503

01:08:17.490 --> 01:08:22.620

Stephanie Bogan: No it's not i'm just being honest here right, so what am I stopping do.

504

01:08:24.300 --> 01:08:31.890

Stephanie Bogan: Success is not about perfection I swear to you I just following the advice that work, so I stopped they literally ask Lisa we had a conversation, this morning I was like.

505

01:08:32.310 --> 01:08:41.130

Stephanie Bogan: I was writing my article, and this was the experience I had, and it was not efficient or enjoyable does it work well, does it feel good those rules did not qualify this has happened, a couple of times.

506

01:08:41.550 --> 01:08:45.660

Stephanie Bogan: We got a break this down and I literally went asked her I swear to God, I went through the triangle, with her.



507

01:08:45.960 --> 01:08:55.440

Stephanie Bogan: Strategy okay didn't have a clear outline when I started that's a function of not having the time you know, making the time to do okay great how to like please go to my schedule and make sure, for the balance of the year.

508

01:08:55.770 --> 01:09:01.770

Stephanie Bogan: That time is calendar, everything has to revolve around that this article is a main thing right it's part of her voice in the marketplace to.

509

01:09:02.130 --> 01:09:08.640

Stephanie Bogan: what's the story i'm telling myself as soon as that writer's block in that state kicks in and i'm stressed, I have to deliver.

510

01:09:08.850 --> 01:09:17.610

Stephanie Bogan: Great that's not empowered state than I than the stories kick in nobody wants to look, I have nothing unique to say, nobody wants to listen to the show I got it right Why am I even writing this.

511

01:09:18.030 --> 01:09:30.480

Stephanie Bogan: Why don't I just reread it literally, this is the stuff that goes through my head for a split second and then I go oh wait, those are the little voices trying to shrink me stall me keep me struck sabotaging me from stepping up and that's just not going to work.

512

01:09:31.530 --> 01:09:38.880

Stephanie Bogan: So i'm not gonna work i'm gonna sit here in my little try and figure it out, and I was like Okay, this is the state, I need to be in when I write.

513

01:09:39.540 --> 01:09:42.780

Stephanie Bogan: Because this is when great stuff comes out and it's easy.

514

01:09:43.230 --> 01:09:52.770

Stephanie Bogan: This is the stories that stopped me from that, and this is the strategy which, in this case happens to be the bigger issue sometimes it's a story sometimes it's a strategy, sometimes it's your say.

515

01:09:53.250 --> 01:10:03.600

Stephanie Bogan: I really want to reinforce and re acquaint you with this triangle, because it's so easy to just skim over, but I promise you, if you write this down and you do it over and over and over.

516

01:10:04.260 --> 01:10:08.280

Stephanie Bogan: Using that above the line and below the line what part of my strategy is a book like parts below the line.

517

01:10:08.850 --> 01:10:18.150



Stephanie Bogan: But above the line let's blow my line with my state right hey what am I stories are bubble, and if you do that work, you will create the level of awareness and focus that I.

518

01:10:18.630 --> 01:10:22.560

Stephanie Bogan: Talk about in the article which is you learn how to keep the main thing, the main thing.

519

01:10:22.860 --> 01:10:31.140

Stephanie Bogan: Which is your happiness your health and your productivity, because those are the things that allow you to be the trusted advisor use your talent, to the betterment of your clients and do all the awesome stuff you want to do.

520

01:10:31.680 --> 01:10:43.470

Stephanie Bogan: Like literally my team was like yes, you have to protect the asset, yes, I do, can we please protect the assets schedule, yes, thank you very much Okay, we have a place that we can refine that can we please systematized that yes, we can.

521

01:10:44.370 --> 01:10:53.640

Stephanie Bogan: So this is not like inspiring mumbo jumbo that I give you guys like these are tools and techniques that I that I use that work with clients that will really help you.

522

01:10:54.030 --> 01:11:00.480

Stephanie Bogan: master your mindset which is really just about owning your mind and elevating your thinking as you do that.

523

01:11:00.810 --> 01:11:11.010

Stephanie Bogan: The overwhelm quiets because you no longer hear the stories telling you that you have to do, six things this quarter to be effective, you realize that Pam if you do one thing.

524

01:11:11.550 --> 01:11:22.200

Stephanie Bogan: If you do one thing on our list this quarter, I think this goes to John's question which is should I follow the learning path online and the calendar, or should I follow my learning path and my answer is easy.

525

01:11:22.740 --> 01:11:31.440

Stephanie Bogan: You should stay tuned into the curriculum learning path because it covers all the bases, but you should be focused on your main things we're trying your learning path.

526

01:11:32.220 --> 01:11:39.930

Stephanie Bogan: So, for those of you that are new you're going to go through the curriculum, as you had you're not going to be able to implement everything, particularly as we go.

527

01:11:40.440 --> 01:11:45.450

Stephanie Bogan: To find that we go to a retreat and you start to really dive into some deeper priorities they take some time to implement.



528

01:11:46.050 --> 01:11:54.420

Stephanie Bogan: But you are in a place to create the awareness around the focus and then pick the things that are going to most move the Needle for you, which is what ultimately will create the most change.

529

01:11:55.860 --> 01:12:05.760

Stephanie Bogan: So I share that because one of the things I had to learn personally is that pain is inevitable, but suffering is optional, and what I mean by that is stuff happens happens.

530

01:12:06.210 --> 01:12:20.100

Stephanie Bogan: You move 10 times in seven months because of code, you have a team in four countries because of code your kids are out of school because of Greg life happens the markets turned staff leave right Adam how to service advisor Lee tiffany had elite advisor Lee.

531

01:12:20.490 --> 01:12:34.440

Stephanie Bogan: Life isn't perfect just because you're clear doesn't mean everything unfolds beautifully and seamlessly in front of you What it means is that you get clear that your job is to not wear the shirt shirt yes, remember that story.

532

01:12:36.180 --> 01:12:47.700

Stephanie Bogan: Yes, and that means one it doesn't have to be broken, to be better, so if you're like doing good great if you're in the progressing in Hydra category your job is to still keep the main thing, the main thing.

533

01:12:48.300 --> 01:12:53.490

Stephanie Bogan: To keep yourself on your side of the street, and what I mean by that is we're so good at comparing and competing.

534

01:12:53.940 --> 01:13:00.090

Stephanie Bogan: And we're so worried about what the other person is thinking is that prospect to say yes that's their side of the street that's not our job.

535

01:13:00.450 --> 01:13:09.990

Stephanie Bogan: Our job is our side of the street what's the value we add how do we add it, what do we charge would you like so that's my side of the street Liz that's my job, their job is to decide.

536

01:13:10.290 --> 01:13:19.050

Stephanie Bogan: Based on how you know their situation, and my ability to communicate that value their job is to decide it's my job to accept whatever they decide that's it that's my job.

537

01:13:19.950 --> 01:13:30.930

Stephanie Bogan: But we don't tend to do that, we tend to do this thing called picking up the stick, which is no matter what's happening out there, we tend to pick up the stick and beat herself with it, you heard me walk through that very example for myself this morning.



538

01:13:31.350 --> 01:13:35.820

Stephanie Bogan: When the article did not come out with the same effortless flow that I really like what did I do.

539

01:13:37.140 --> 01:13:43.050

Stephanie Bogan: I went to the stories and I picked up the stick wow I don't even right, whereas is so hard Why is this happening, why does, I want to listen to a.

540

01:13:43.590 --> 01:13:53.310

Stephanie Bogan: Great like the US, our first instinct is somehow, this is my fault it's my lack it's my problem and our job is to set that stick down like literally it just is what it is.

541

01:13:53.940 --> 01:14:04.680

Stephanie Bogan: Which is what it is it's our job to get really clear on where we focus that's going to move the needle and literally do everything in our power to get rid of all the voices in our head.

542

01:14:05.490 --> 01:14:17.790

Stephanie Bogan: Because that's what holds us back more than anything else right we think control is things going to save us if I do this if I get my closing rate to that those are also mess they're just strategies that we use to create the security that we want.

543

01:14:18.990 --> 01:14:19.860

Stephanie Bogan: it's the shirt shirt.

544

01:14:20.910 --> 01:14:27.600

Stephanie Bogan: don't wear stonework if you're clear on what you want to create if you're clearing with the main thing is for the year in the main thing again.

545

01:14:27.930 --> 01:14:36.360

Stephanie Bogan: If it's to build that hundred million dollar hundred a practice, the main thing might include, as it should in that one page plan, because there are boxes just for it.

546

01:14:36.720 --> 01:14:41.280

Stephanie Bogan: Key objectives Liz what do I have to do key objective to accomplish that goal.

547

01:14:41.970 --> 01:14:50.490

Stephanie Bogan: I probably have to grow my revenue, a certain percentage, I have to redo maybe have to reduce the number of clients that I have a select group of higher net worth clients, I have to grow my higher net worth clients.

548

01:14:50.910 --> 01:15:00.390

Stephanie Bogan: I have to define my standard a service model, so I can deliver the value and the system is efficient



way I gotta hire staff or whoever i'm going to do right I gotta ups, like the list is not short.

549

01:15:01.350 --> 01:15:15.990

Stephanie Bogan: Of the things that you can do, but if we can get clear on the main thing that means that we align all of our energy and efforts with the things that move us forward which creates more empowered energy creates a better state creates better strategies hockey stick effect makes sense.

550

01:15:17.880 --> 01:15:27.420

Stephanie Bogan: Alright, so engagement audit is really about how you're engaging so Ben has given you a lot of examples of how he's how key engaged.

551

01:15:27.810 --> 01:15:32.970

Stephanie Bogan: In the content, how does use that, in practice, and how it's really worked for him, your job.

552

01:15:33.330 --> 01:15:43.680

Stephanie Bogan: is to do the same thing, so that two or three years from now, you can be sitting here telling a group of people you're awesome story right whether you're a coach or not like we use like that's the whole point.

553

01:15:44.070 --> 01:15:50.250

Stephanie Bogan: So this is truly me just reminding you, because I think about 45 or 50% of you have i'm correct.

554

01:15:50.610 --> 01:15:57.480

Stephanie Bogan: On tribe, the other half of you are in that zone of being too busy or deciding that you are not a tribe person and that's totally cool.

555

01:15:57.930 --> 01:16:04.740

Stephanie Bogan: Except that you want to share there's a lot of amazing coaching and content that happens on tribe to your monthly coaching calls, which is what we're doing now.

556

01:16:05.040 --> 01:16:10.410

Stephanie Bogan: And office hours, please as you're implementing brings specific questions to office hours.

557

01:16:10.710 --> 01:16:20.550

Stephanie Bogan: Pam that's what forces you to move into that stage for like the refining or hurt like you have to own it Aaron if you bring the question about how you're applying it, or how you're about to apply it.

558

01:16:20.910 --> 01:16:31.230

Stephanie Bogan: that's the next best step so it's not your natural state, because I know you come to listen and absorb a lot, but I really want to challenge you to come to every office hours with a question.

559

01:16:32.010 --> 01:16:40.710



Stephanie Bogan: With a question it doesn't mean we're going to answer them all in office hours but you'll put them in slide Oh, and I and whoever's doing the call will make sure that they're all answered in tribe after the fact, which we do.

560

01:16:42.030 --> 01:16:49.020

Stephanie Bogan: If you force yourself to have a question it gets your brain in the zone of action, accountability and awareness.

561

01:16:49.530 --> 01:16:58.080

Stephanie Bogan: So, for those of you in lifestyle, you also have a second coaching call every month, the second office hours with the advisors and right one on one calls to really dive into those specifics.

562

01:16:58.380 --> 01:17:08.070

Stephanie Bogan: For those of you in lunch, you are now connected into everything on tribe, and as we do those group calls, you will have access and be invited to those so please take advantage and leverage tribe.

563

01:17:08.460 --> 01:17:15.540

Stephanie Bogan: To the utmost of your ability, because it's where you're going to get a lot of the same coaching that Ben and Adam and tanya got their first year guess where they got most of it.

564

01:17:16.890 --> 01:17:23.160

Stephanie Bogan: and got it on tribe it wasn't as cool to try it wasn't as awesome but that's where they brought their questions and that's where they got.

565

01:17:23.490 --> 01:17:30.810

Stephanie Bogan: A lot of their answers so don't think of it as a forum, think of it, it is a place where you go to figure things out and move forward in a really awesome way.

566

01:17:32.190 --> 01:17:41.220

Stephanie Bogan: Okay, so progress on it, we have talked about a lot of stuff you are going to have the opportunity to do a progress audit at the end of the quarter.

567

01:17:41.940 --> 01:17:50.850

Stephanie Bogan: But what I want you to do right now to just get really clear on some of the progress that you've made because I know we already talked a lot about today, not just counting last for three months.

568

01:17:51.870 --> 01:17:52.350

Stephanie Bogan: breathe.

569

01:17:54.630 --> 01:18:04.170

Stephanie Bogan: What are your three biggest wins or gains from this quarter's work from your participation and limitless for the last 68 days or whatever it is.



570

01:18:05.430 --> 01:18:06.360

Stephanie Bogan: three biggest ones.

571

01:18:10.710 --> 01:18:17.010

Stephanie Bogan: This is your invitation to pause and write them down and i'm going to ask you to drop some in chat so we can see what they are.

572

01:18:19.980 --> 01:18:21.120

Stephanie Bogan: Susan do you have yours.

573

01:18:26.670 --> 01:18:28.380

Susan Pack, CPA/PFS, CFP?, CKA?: I got my email migrated.

574

01:18:29.040 --> 01:18:29.700

Stephanie Bogan: Excellent.

575

01:18:29.790 --> 01:18:30.900

Susan Pack, CPA/PFS, CFP?, CKA?: For me yeah.

576

01:18:31.230 --> 01:18:36.570

Stephanie Bogan: that's huge yeah alright Neil, what about you do you have any big wins to share.

577

01:18:38.160 --> 01:18:42.120

Neal Albritton: We implemented search meetings and restarted our financial planning fees.

578

01:18:42.480 --> 01:18:43.680

Stephanie Bogan: awesome how did that go.

579

01:18:44.880 --> 01:18:47.040

Neal Albritton: we're still in the middle of surgeons actually a lot of fun.

580

01:18:47.400 --> 01:18:54.510

Stephanie Bogan: awesome well she has questions for Ben and I around that pamela high net worth client go they didn't fit her model, how did that feel.

581

01:18:58.200 --> 01:19:05.310

Stephanie Bogan: Actually really good yeah notice the difference if I had said to you, six months ago you're gonna let the signer with Blanco, you probably would have been like.

582



01:19:06.180 --> 01:19:11.010

Stephanie Bogan: Why am I gonna do that crazy lady, and now, instead of it being like this terrorizing event it's.

583

01:19:11.310 --> 01:19:18.420

Stephanie Bogan: you're really clear that you're leaning into the main thing and your goals in like that's the clarity peace, whereas before.

584

01:19:18.720 --> 01:19:24.690

Stephanie Bogan: We we didn't have that clarity, like it's it's really fuzzy What helps and what doesn't help and the progress on it.

585

01:19:24.990 --> 01:19:32.100

Stephanie Bogan: Again, whether it's with the personal learning plan that we have you do each quarter or the calls with lease or calls with me or tribe it's really about getting clear on.

586

01:19:32.790 --> 01:19:46.650

Stephanie Bogan: Am I clear, am I taking action in my making gains not did I do everything I could possibly do, but am I, making material progress great Liz created a container for the service team meet to meet each week they keep moving all right.

587

01:19:48.390 --> 01:19:53.460

Stephanie Bogan: Great service team defined the service team roles and implemented Ruby receptionist to relieve call volume on the service team.

588

01:19:53.820 --> 01:20:02.730

Stephanie Bogan: i'm not saying that you're not going to get a ton more out of this but Pam if you just did that this year and stop you would get your tuition and then some every year into perpetuity every year.

589

01:20:03.570 --> 01:20:14.190

Stephanie Bogan: We do one thing in this program you're going to get your money's worth, but that is not the goal right The goal is to pick the few things each quarter and year, and that is where you're going to get that hockey stick effect, not by doing more.

590

01:20:14.580 --> 01:20:28.260

Stephanie Bogan: By doing better all right and found a great new application to help with workflows get them standardized and can get set up to have a va film and growth right So you see how each of those things really supports that person's main thing.

591

01:20:30.240 --> 01:20:34.770

Stephanie Bogan: Which is very different than the busy work that we really get stuck doing a lot of the time.

592

01:20:36.570 --> 01:20:48.180

Stephanie Bogan: All right, let's talk a little bit about the qpr, this is not bins queen bee role, this is the quarterly



business review process we've talked about this i'm not going to spend a ton of time on it, but I just again want to remind you that it's coming up.

593

01:20:48.690 --> 01:20:55.140

Stephanie Bogan: And we'll be talking about it more in April, which is that quarterly Business Review, this is your chance to now go back to your personal launch plan.

594

01:20:55.620 --> 01:21:00.090

Stephanie Bogan: Which is write your quarterly take on how you're going to implement your business plan this quarter.

595

01:21:00.510 --> 01:21:08.580

Stephanie Bogan: and follow the quarterly business review cycle that we have built into the planning the planning and accountability lesson, so this is about sitting down whether it's you.

596

01:21:08.970 --> 01:21:14.640

Stephanie Bogan: over to our lunch with yourself, or you and your team of 12 people right there's variations of it, you can follow.

597

01:21:14.940 --> 01:21:25.530

Stephanie Bogan: But it's really about doing that review of Am I focused in my clear, am I on track, am I doing the things that move the needle what's standing in our way, what do we need to address right all the stuff that you would expect.

598

01:21:26.070 --> 01:21:39.000

Stephanie Bogan: And we actually updated and i'm sharing a new team report card that you can use in the weekly meetings right that you use with your team or in your staff to keep yourself on track in between the Business Review cycles.

599

01:21:39.390 --> 01:21:45.930

Stephanie Bogan: This is not a client review agenda you guys have those we have examples of those, this is actually team report card.

600

01:21:46.500 --> 01:21:55.620

Stephanie Bogan: and the report card is literally like what's your three minute update on what stood between you and your goals for the role and great for the firm this quarter you'll get valuable feedback.

601

01:21:56.040 --> 01:21:59.820

Stephanie Bogan: check in on what helped and what hindered goals review.

602

01:22:00.360 --> 01:22:09.660

Stephanie Bogan: Trying to read the teeny tiny print a productivity score and then like literally was this meeting, a good meeting or not like are these meetings helpful and productive or they literally put a pencil money and waste



my time.

603

01:22:10.260 --> 01:22:17.730

Stephanie Bogan: And then capture key positions and next steps, which is a really simple way to create a forcing mechanism for you and your team.

604

01:22:18.060 --> 01:22:26.160

Stephanie Bogan: To make sure that you're coming to meetings with things that are going to materially move the needle that you're clear in your focus and your priorities, and you have a mechanism.

605

01:22:26.550 --> 01:22:37.020

Stephanie Bogan: for creating that transparency about how things are working across the team, so you can address breakdowns Pam I promise you Aaron the promise you Whitney I promise you stephanie I promise you, if you use this team report card.

606

01:22:37.350 --> 01:22:42.750

Stephanie Bogan: Every week there will be something that shows up here's something that we can do better here's a breakdown in the process.

607

01:22:43.050 --> 01:22:50.340

Stephanie Bogan: It doesn't mean you stop and do it all, it means that you note it you prioritize it and then you put it in your right, your roadmap plan for change.

608

01:22:51.120 --> 01:23:02.130

Stephanie Bogan: But the process of holding ourselves accountable to our plans and our priorities is really important to creating the discipline of focus in order to keep doing that, if that makes sense.

609

01:23:02.640 --> 01:23:12.420

Stephanie Bogan: So, not the most exciting thing that you will ever hear me talk about, but one of those really boring yet substantive things that really kind of laid the foundation for our success so.

610

01:23:12.750 --> 01:23:19.380

Stephanie Bogan: Again we'll be talking more about this and and doing some coaching around it in our weekly inbox but I really want to just remind you guys how important this is.

611

01:23:20.610 --> 01:23:30.060

Stephanie Bogan: Okay, I think we have about another 10 minutes or so we've had a lot of conversation we've had a lot of questions, I want to pause here allison do we have any other questions in sight Oh, we want to cover.

612

01:23:32.310 --> 01:23:34.560

Limitless Adviser: We do not have any unanswered ones, and I.

613



01:23:34.560 --> 01:23:37.260

Limitless Adviser: Think you're so funny i'm covering the coaching one we're good.

614

01:23:37.320 --> 01:23:46.860

Stephanie Bogan: All right, yeah the coaching when I think I answered for you john but it's true for everyone, follow the learned the online path in terms of the lessons.

615

01:23:47.550 --> 01:23:58.410

Stephanie Bogan: And then you know as you as your as your kind of think of that is your tour guide through the program but your focus is on the right, the main things that move the needle priorities that go in your quarterly launch plan.

616

01:23:59.280 --> 01:24:05.370

Stephanie Bogan: We go through that process together every quarter, as always, if you need help, please let me know and I are the team will make sure that you get it.

617

01:24:06.690 --> 01:24:18.660

Stephanie Bogan: Alright, so I know that is one of the challenges, because we do give you guys the tour guide through everything instead of dragging it out for four years, you do have to make decisions, especially as we move forward about what to do and not do now.

618

01:24:19.020 --> 01:24:22.200

Stephanie Bogan: Which is why I want to end with the conversation about the main thing.

619

01:24:22.800 --> 01:24:29.880

Stephanie Bogan: So, as I was writing as I was talking to Ben and preparation for this call and really reflecting on where we were from a time perspective.

620

01:24:30.210 --> 01:24:37.740

Stephanie Bogan: I was working on my article around the main thing, and I did some research and around January 1 of every year we set these really awesome goals they're called resolutions.

621

01:24:38.130 --> 01:24:48.870

Stephanie Bogan: In some cases, and by February for 31st 32 days later, the statistics say that 98% of us have lost sight of those goals and gotten back on the tesla's treadmill as I like to call it.

622

01:24:49.320 --> 01:24:59.070

Stephanie Bogan: A full 68% of us give up before February 1 so you are not in that group for the most part, but what I noticed every year is that right about March.

623

01:24:59.670 --> 01:25:08.430

Stephanie Bogan: advisors get overwhelmed now my theory is that if we lose sight of the goals around February around the end of March, LIFE has happened for 30 days.



624

01:25:08.790 --> 01:25:14.700

Stephanie Bogan: And what happens when life happens for 30 days with that the clarity of focus and the main thing to keep us moving in the direction we need to be moving.

625

01:25:15.510 --> 01:25:24.660

Stephanie Bogan: We get overwhelmed we get overwhelmed so every year around March or April I can almost guarantee you if you don't have that clarity and focus it's a good time to get overwhelmed.

626

01:25:25.200 --> 01:25:39.960

Stephanie Bogan: Which is why about this year, every time we have a conversation about the main thing as in if you guys are familiar with Stephen Covey one of the most impactful things that he I think he ever wrote was the main thing is learning how to keep the main thing, the main thing.

627

01:25:41.670 --> 01:25:49.380

Stephanie Bogan: You actually can color code for the free there's three main things in there, the main thing, the most important thing we do.

628

01:25:50.100 --> 01:26:00.480

Stephanie Bogan: is to keep the main thing, the most important thing we're working on right now, relative to the outcome and the bowls you want to create the main thing the thing that we actually focus on.

629

01:26:01.800 --> 01:26:11.070

Stephanie Bogan: But if I audit 80% of our days they're not focused on the main thing it doesn't mean you're gonna have to run the shop or do the service it's about doing that in a contained an organized way.

630

01:26:11.460 --> 01:26:17.310

Stephanie Bogan: That aligns with your goal, not being subject to the treadmill tsunami that tends to overwhelm us on a daily basis, which.

631

01:26:17.700 --> 01:26:25.590

Stephanie Bogan: Not to beat a dead horse right Ben is in particularly good at talking about productivity and focus and things of that nature so always feel free to pick his brain.

632

01:26:26.040 --> 01:26:40.050

Stephanie Bogan: But my experience is, we find ourselves in those problems when we aren't focused on the main thing and we forget to ask ourselves the two most powerful coaching questions, I know, to keep us focused on the main thing one in service of what.

633

01:26:41.250 --> 01:26:53.160

Stephanie Bogan: Is that new idea is that opportunities been updating his conversion process what's it in surface up it's in service of doing a better job of telling the story, improving the conversion rate right okay great at the cost of what.



634

01:26:54.240 --> 01:27:05.580

Stephanie Bogan: This is the part we were really good at rationalizing why we should do something, why we should take on the opportunity, why it's okay to do five things they all really have to be done right now, like we're so good at making excuses, instead of results.

635

01:27:06.870 --> 01:27:11.850

Stephanie Bogan: But what we forget to do is remind ourselves that we have a limited amount of time, energy and focus to do them.

636

01:27:13.020 --> 01:27:22.350

Stephanie Bogan: And so we do so many things that we lose track of the main thing, like the things that we can do with our time that will one do the main main thing which is service or cleanse well and deeply.

637

01:27:23.130 --> 01:27:33.480

Stephanie Bogan: But so much of what distracts us keeps us from doing that main thing and we add to that more things to grow and to do this and add this and to add that, because we lose sight of the main thing.

638

01:27:34.260 --> 01:27:42.330

Stephanie Bogan: So step one is, as you face the end of the first quarter you've got a lot of insight a lot of education and hopefully a hell of a lot of empowerment.

639

01:27:42.840 --> 01:27:56.820

Stephanie Bogan: To go use it in terms of tools and resources and samples and straight out rip off and coaching conversations, but I want to end this call by asking you all, are you clear on your main thing as we wrap up q1 and we face quarter two.

640

01:27:59.880 --> 01:28:01.080

Stephanie Bogan: So take out a piece of paper.

641

01:28:03.330 --> 01:28:12.720

Stephanie Bogan: write down as you look at your year but, in particular, as you look at wrapping up q1 and facing q2 April May and June, what is your main thing.

642

01:28:28.170 --> 01:28:32.430

Stephanie Bogan: Is anybody having fun having funny having trouble defining their main thing.

643

01:28:34.140 --> 01:28:38.340

Stephanie Bogan: Because if so i'm going to grab you and we're going to put you on live and we're going to help you solve your main thing.

644

01:28:40.140 --> 01:28:41.370

Stephanie Bogan: Anybody have one of those.



645

01:28:44.130 --> 01:28:46.020

Stephanie Bogan: Come on, where the braves in the group.

646

01:28:47.970 --> 01:28:49.320

Stephanie Bogan: i'm nicely Square.

647

01:28:51.360 --> 01:28:54.690

Stephanie Bogan: See time you tells people to 10 minutes, change your life and nobody wants to talk to me anymore.

648

01:28:56.760 --> 01:28:58.110

Scott Sullivan: This is Scott Solomon oh.

649

01:28:58.320 --> 01:28:58.710

God.

650

01:29:00.090 --> 01:29:00.690

Stephanie Bogan: How are you.

651

01:29:01.260 --> 01:29:01.830

Scott Sullivan: Good how are you.

652

01:29:02.160 --> 01:29:10.440

Stephanie Bogan: i'm happy today trying to find you i'm trying to find your video on here all right all right, what are you are you struggling with the main thing, do you have a main thing.

653

01:29:11.070 --> 01:29:17.220

Scott Sullivan: i'm struggling with it, I don't know if it should be business related or personal related or somehow combine the two.

654

01:29:17.790 --> 01:29:24.720

Stephanie Bogan: Okay, I suppose the books on the main thing would really keep you focused on a main thing I tend to look at my personal life and professional life.

655

01:29:25.320 --> 01:29:33.480

Stephanie Bogan: Sometimes those interests are competing but ultimately right personal goals and professional goals, I think, should always be done simultaneously, because both realms of the of your life.

656

01:29:33.900 --> 01:29:43.590



Stephanie Bogan: have to simultaneously so coexist so for ease let's just say we're going to focus on your professional goal a main thing personally in a main thing professionally how's that sound.

657

01:29:44.850 --> 01:29:52.890

Stephanie Bogan: Good okay all right, what is your main reason for being here like what is the big thing you want to accomplish this year that's going to truly move the Needle for you.

658

01:29:55.590 --> 01:29:57.840

Scott Sullivan: Personally, it is to.

659

01:29:59.430 --> 01:30:03.030

Scott Sullivan: be above the line on a daily basis.

660

01:30:03.780 --> 01:30:04.080

Okay.

661

01:30:07.620 --> 01:30:08.010

Stephanie Bogan: Okay.

662

01:30:09.090 --> 01:30:13.080

Stephanie Bogan: What is standing like what's the resistance between you and being above the line.

663

01:30:16.590 --> 01:30:17.700

Scott Sullivan: overwhelm I guess.

664

01:30:20.490 --> 01:30:22.050

Stephanie Bogan: What has you feeling overwhelmed.

665

01:30:24.930 --> 01:30:34.170

Scott Sullivan: I want to focus in on retirement income planning, but to ben's point of guardrails versus bucket strategies just.

666

01:30:35.370 --> 01:30:37.320

Scott Sullivan: trying to find the perfect thing instead of.

667

01:30:38.580 --> 01:30:39.570

Scott Sullivan: Just moving forward.

668

01:30:39.960 --> 01:30:46.980

Stephanie Bogan: Right, so not sure what to do is keeping you from taking that next step, yes okay does anybody



relate to this problem.

669

01:30:48.300 --> 01:30:52.290

Stephanie Bogan: The honest to minus rate high five stubble yeah like this is so, so common.

670

01:30:52.590 --> 01:31:01.200

Stephanie Bogan: Because we look at everything that we can do, and our brains like oh my God is broken, we got to fix it and it forgets that writes that best way to eat an elephant is one bite at a time.

671

01:31:01.650 --> 01:31:06.240

Stephanie Bogan: overwhelm for anyone that experiences this myself included, is just a story.

672

01:31:06.660 --> 01:31:15.600

Stephanie Bogan: that's all it is, it is a story that invokes neural chemicals that creates a State right adrenaline noradrenaline cortisol stress chemicals not happy chemicals.

673

01:31:16.440 --> 01:31:32.070

Stephanie Bogan: That evokes a state when our brain start to worry about the What if what if this happens, what if this happens, what if I miss out on this whatever and those what IFS rate create fear and uncertainty and doubt and anxiety and stress, and that is the source of all the overwhelming.

674

01:31:33.090 --> 01:31:42.330

Stephanie Bogan: task list also, by the way, a source of overwhelming that's, quite honestly, because we have a really solid relationship with our task list you many of you view your task list.

675

01:31:42.990 --> 01:31:58.860

Stephanie Bogan: As in Scott, maybe this is you as a transaction, that is, ultimately, going to be completed to some satisfaction your task list isn't no way that he will never be completed, it is a continuous cycle of work that reflects your current priorities.

676

01:32:00.570 --> 01:32:05.730

Stephanie Bogan: And the reason that we tend to get really frustrated with the task, this is because it often doesn't reflect our main thing.

677

01:32:05.970 --> 01:32:10.380

Stephanie Bogan: Our energy creating or revenue producing great activities, which is a separate conversation.

678

01:32:10.680 --> 01:32:20.820

Stephanie Bogan: But in the case of overwhelm the antidote to overwhelm is to pick one thing like what is the one thing if you said this quarter i'm going to focus all of my limitless time and energy.

679



01:32:21.120 --> 01:32:31.380

Stephanie Bogan: on accomplishing this goal, because it's going to really move me forward and I don't know saying this is a platitude is going to move the needle in a meaningful way what would make the list.

680

01:32:32.610 --> 01:32:36.900

Stephanie Bogan: This is that coaching exercise, we can all do together, by the way, what would make the list this quarter.

681

01:32:37.890 --> 01:32:42.210

Scott Sullivan: i've been focused on in defining an onboarding process.

682

01:32:42.630 --> 01:32:43.620

Stephanie Bogan: Okay, what else.

683

01:32:45.270 --> 01:32:48.030

Scott Sullivan: That was my That is my one thing for the first quarter.

684

01:32:48.330 --> 01:32:58.260

Stephanie Bogan: Okay, so is the source of overwhelmed that you're competing with your daily demands for time to work on that priority, or is it that you don't know how to engage in that priority.

685

01:33:00.570 --> 01:33:01.440

Scott Sullivan: The daily.

686

01:33:02.670 --> 01:33:03.360

Scott Sullivan: stuff.

687

01:33:04.620 --> 01:33:05.760

Scott Sullivan: grabs my attention.

688

01:33:06.180 --> 01:33:09.090

Scott Sullivan: Okay, be more reactive instead of proactive.

689

01:33:09.660 --> 01:33:20.130

Stephanie Bogan: So if we're being really tough on you as a coach right now, I would ask you, the question of whether the main thing was really defining and your onboarding process or getting control of your daily schedule and productivity.

690

01:33:23.070 --> 01:33:38.490

Stephanie Bogan: None of you are Superman, myself included, until you get a handle on your productivity until you own your mind and organize your time you will struggle, you cannot put 10 pounds issue isn't it and do a five pound



bag and expect excellence must less happiness asked me i've tried.

691

01:33:39.600 --> 01:33:53.820

Stephanie Bogan: Every time I continue to try think oh i'm really good at this, I like we tease ourselves by when the more that we try to do become so overwhelming, even to the optimist and as that we have to deal with reality, you know what our next tendency to do is so often.

692

01:33:55.530 --> 01:34:04.500

Stephanie Bogan: We disguise our progress as efficiency progress Oh, you know what i've got too much to do, I got to go be efficient i'm not denying that you need to do that, we are all about that.

693

01:34:04.770 --> 01:34:12.870

Stephanie Bogan: But really Oh, I need you more and more and more and i'm overwhelmed with more I need to get more efficient, so I can get faster and putting more shit on my plate that I don't have time to do.

694

01:34:13.530 --> 01:34:28.110

Stephanie Bogan: Like that's literally what we do to ourselves because we are not clear on the main thing, so one, the main thing that you do one second before you grow as you have to service the clients, you have to your satisfaction in theirs.

695

01:34:29.400 --> 01:34:36.090

Stephanie Bogan: and honestly yours is actually a higher bar, in most cases, because you will be the one to tell me, I should do this I should do this I should do that so.

696

01:34:36.420 --> 01:34:42.360

Stephanie Bogan: Step one is service, make sure you're servicing the client, you have my experience is the best way to do that is to own your time.

697

01:34:43.260 --> 01:34:54.030

Stephanie Bogan: You don't need to grow one more your order to get happier more satisfied more productive, you need to make better use of the time you have know For those of you that are brand new and truly just starting out you have lots of time you still want to be focused about it.

698

01:34:55.350 --> 01:35:01.560

Stephanie Bogan: But for those of you that have a client base and competing priorities, which is most of you, this is the biggest issue you've got.

699

01:35:02.040 --> 01:35:15.450

Stephanie Bogan: it's not any of the stuff that we're talking about it's how you create the time and the headspace to tackle the stuff that we're talking about we all love to watch that lesson here a couple of things we all listened to Ben talk about he freaking own just time right then you're there.

700

01:35:16.860 --> 01:35:19.050



Benjamin Brandt CFP®, RICP: yeah i've every minute of the day, scheduled.

701

01:35:19.620 --> 01:35:24.540

Stephanie Bogan: So if I like the first thing you guys do is you figure out what Ben is doing, and you go to that.

702

01:35:25.200 --> 01:35:29.310

Stephanie Bogan: To his point, and then you tweak the part of that doesn't work for you or use tanya's or use mine.

703

01:35:29.820 --> 01:35:36.120

Stephanie Bogan: But we do that, like Oh, I need to manage my time better and we skip straight on to I don't want to work on this thing and I totally get it, I really do.

704

01:35:36.810 --> 01:35:43.410

Stephanie Bogan: But Scott, if your situation is that your daily grind is creating distraction than job one is to figure out.

705

01:35:43.800 --> 01:35:50.850

Stephanie Bogan: How do I get more productive on a daily basis, so that I have the time and the clarity right that the time on my calendar and the headspace to do this.

706

01:35:51.150 --> 01:35:55.080

Stephanie Bogan: And it might, by the way, doesn't mean you wait six months got it might mean that you say.

707

01:35:55.410 --> 01:36:06.150

Stephanie Bogan: You know what i'm going to carve out two hours a day, where I can no circumstances be interrupted I don't check my email I don't talk to my staff I don't do anything except the one thing I put on my calendar that i'm just going to practice my one thing.

708

01:36:06.510 --> 01:36:15.810

Stephanie Bogan: Just to get in the habit of it and Scott, maybe that one thing is you're right onboarding process, and so you say i'm going to spend two hours a week or 30 minutes a day.

709

01:36:16.350 --> 01:36:26.910

Stephanie Bogan: But i'm going to move forward and that's my main thing and then your job is to organize everything else in your life, starting with your schedule, because that's how our vision becomes real around that mean thing.

710

01:36:27.660 --> 01:36:37.410

Stephanie Bogan: For each of you will be different like for Scott, it might be that he takes an entire day and he nails that process for Jennifer it might mean that she carves out 30 minutes a day to work on it.

711

01:36:39.990 --> 01:36:45.870



Stephanie Bogan: that's not really the relevant point, the point is Where are you where you need to be what steps can you take.

712

01:36:46.560 --> 01:36:55.920

Stephanie Bogan: Are those steps aligned with this, the, the main thing right now I promise you you'll have time to do another main thing in 90 days but what's, the main thing right now so Scott.

713

01:36:56.430 --> 01:37:11.190

Stephanie Bogan: With that in mind, as it relates to your bigger goal of not being overwhelmed delivering the value to clients right growing the million dollar practice, what is the main thing that you can do this quarter to really put yourself in a position to succeed.

714

01:37:13.980 --> 01:37:23.100

Scott Sullivan: conversation is to own my time and that's something I struggled with for years so that sounds like the the right thing to choose.

715

01:37:23.520 --> 01:37:33.420

Stephanie Bogan: And it's The thing that we all struggle with, by the way, because it's the thing we're constantly manning because we always want to do and grow and have and be in more in achieving, like all the things which is why the focus thing is so important and.

716

01:37:33.660 --> 01:37:46.410

Stephanie Bogan: So I constantly highlight ben's ability to focus he's just so clear it's the main supports the main thing or it doesn't it helps my goal, or it doesn't like in his mind there's very little i've been maybe some but there's very little black and white.

717

01:37:49.050 --> 01:37:59.100

Stephanie Bogan: Great alright, so do you guys see again that's not the most comfortable like it's so much fun, or to be like oh I gotta go update my onboarding process now the good things guys i'm not going to tell you, you can't.

718

01:37:59.760 --> 01:38:09.900

Stephanie Bogan: What i'm going to suggest here is that you layer your main thing which is owning your time into practicing how to own your time, which is, you have a priority that's also important not urgent but important.

719

01:38:10.710 --> 01:38:20.280

Stephanie Bogan: what's the system that you can use what's the schedule that you can make possible and commit to that will help you focus on that main thing like, how do you make it happen.

720

01:38:22.410 --> 01:38:29.580

Scott Sullivan: So i've tried to use the success chapter in the past, which I use for a few days or a week and then.

721

01:38:30.720 --> 01:38:35.970

Scott Sullivan: It gets pushed off to the side so bringing that back out and using that more.



722

01:38:37.530 --> 01:38:41.040

Scott Sullivan: Effectively, and then also putting together a weekly calendar.

723

01:38:42.930 --> 01:38:45.480

Scott Sullivan: Just blocking my time in sticking to that.

724

01:38:46.080 --> 01:38:56.190

Stephanie Bogan: And a really valuable thing to know about the success shifter or habits journal or However, your cat tracking and managing your habits and time is that when we struggle that's where workers that's the resistance.

725

01:38:56.640 --> 01:39:05.070

Stephanie Bogan: Like what's on that sheet that's either keeping you from getting in that groove or what's happening outside of that sheet that's keeping you from getting in that groove.

726

01:39:06.660 --> 01:39:14.220

Stephanie Bogan: And that will always tell you where the near term work is, which again may or may not be the problem you need to solve related to the big thing, but the clearer, you can get.

727

01:39:15.150 --> 01:39:25.470

Stephanie Bogan: that the reason that you're struggling to define and up level your onboarding processes be showing us the focus or the time that you need to really sit down and do it thoughtfully and intentionally and create the experience that you want.

728

01:39:25.950 --> 01:39:30.810

Stephanie Bogan: you're going to feel bad about it you're going to do it 17 times halfway to ben's point what was that coven.

729

01:39:32.280 --> 01:39:38.880

Benjamin Brandt CFP®, RICP: don't half ass two things whole last one thing I didn't look that up, it is a RON swanson quote I don't want it to full credit for that.

730

01:39:39.060 --> 01:39:50.850

Stephanie Bogan: RON swanson said it brilliantly, and I will end on that note Scott don't have as one thing know what is it don't have a six things do one round hole last one thing which is.

731

01:39:51.450 --> 01:40:02.850

Stephanie Bogan: Step one is, we must own our time and productivity, because that is what we, that is, the, that is, the attention and the energy is what we applied with our focus, so we can be as focused as we want if we don't create the time for it, we can't follow through.

732

01:40:04.410 --> 01:40:12.690



Benjamin Brandt CFP®, RICP: And will this be the topic of our office hours at the top of the hour yep alright so so bring more of these types of questions and I see if you in the chat and I really want to answer them.

733

01:40:14.790 --> 01:40:19.470

Stephanie Bogan: Right and we will answer them on slide oh as well, so we will get to all of those I didn't want a quick.

734

01:40:19.710 --> 01:40:28.080

Stephanie Bogan: check in was this helpful to you guys today in terms of getting clear on the main thing, how to use what we've talked about in practice how to really like we covered a lot.

735

01:40:28.680 --> 01:40:39.210

Stephanie Bogan: covered what we've covered how to great get engaged get all you know really get clear on the role that you're playing we've talked about how to apply that with Ben in practice, which I think is super awesome Ben Thank you so much.

736

01:40:39.720 --> 01:40:47.550

Stephanie Bogan: And then we've really followed up with what keeps us from doing that in the first place, which is all the distractions that keep us not focused on the main thing.

737

01:40:47.940 --> 01:40:55.140

Stephanie Bogan: And I think again ben's example is pretty extraordinary in terms of rate, how you create the hockey stick effect when you finally figure it out and own it.

738

01:40:55.920 --> 01:41:04.800

Stephanie Bogan: So, in terms of just high level things we will be starting a member advisory board so be on the lookout for that we will be giving you a may retreat updates.

739

01:41:05.100 --> 01:41:14.790

Stephanie Bogan: We have our April 12 coaching call come up i'm actually really excited about this, because the may retreat has gone virtual to be followed up with some cool stuff so don't get too bummed out.

740

01:41:15.300 --> 01:41:23.190

Stephanie Bogan: And we really looked at the agenda in terms of value and where we wanted to layer things and take advantage of things sooner versus than later.

741

01:41:23.430 --> 01:41:30.330

Stephanie Bogan: Which is a really interesting way of sharing that we will add we've actually changed the agenda for April 12 call, and I believe that amy can confirm.

742

01:41:31.560 --> 01:41:35.400

Stephanie Bogan: That we have both it's good to have friends both Julie little child and.



743

01:41:35.970 --> 01:41:43.860

Stephanie Bogan: candace from Viacom coming to talk about ways that we deliver value in very much a coaching jam session, not a presentation.

744

01:41:44.220 --> 01:41:56.910

Stephanie Bogan: But really a preview of one, how do you really define value and get client engagement in a way, where they can really appreciate the value into how do you create and Ben highlighted this and I think it's such an important topic.

745

01:41:57.630 --> 01:42:01.890

Stephanie Bogan: we're going to do a keynote and follow up sessions on it may, which is how do you deliver virtual value.

746

01:42:02.610 --> 01:42:08.880

Stephanie Bogan: How to use video, which is the format that we are largely using that we will continue to use a lot of.

747

01:42:09.390 --> 01:42:18.690

Stephanie Bogan: In a way to ben's point like sitting across from someone looking at the eyeballs body language, those are different than sitting in a screen, where you have to really look in the screen and say.

748

01:42:19.170 --> 01:42:26.130

Stephanie Bogan: What do you think of that, would you agree, like these are little things that we take for granted and person that we have to get really clear on so candace.

749

01:42:26.790 --> 01:42:33.990

Stephanie Bogan: In May, and I reframing out a conversation about how to use virtual value with prospects, how to use it, the clients, how to use it marketing or a podcast.

750

01:42:34.590 --> 01:42:47.790

Stephanie Bogan: Video things like that, but I asked her and Julie, if they would both come kind of do a preview session on delivering value from those two very different perspectives, just so we could start to dive in talk about what you're doing and really to you guys up.

751

01:42:48.420 --> 01:42:54.090

Stephanie Bogan: To get really excited about how you can lean into those things as we go into the main retreat so i'm super excited about that.

752

01:42:55.410 --> 01:43:02.040

Stephanie Bogan: All right, I actually think I went over by 10 minutes I got to really work on my clock skills that is a skill test for stephanie because I don't.

753

01:43:02.730 --> 01:43:07.050



Stephanie Bogan: Like talking to you guys on video I y'all are welcome to drop off at the end of the hour.

754

01:43:07.440 --> 01:43:16.860

Stephanie Bogan: band, I want to thank you so much for your time today and, in particular, all the details on the walkthrough on in practice and how you're applying the story and the focus and the main thing.

755

01:43:17.400 --> 01:43:24.810

Stephanie Bogan: I see a bunch of thumbs up I think that's, you know as much as the theory and the best practices are super valuable, I know how great it is to hear.

756

01:43:25.140 --> 01:43:30.690

Stephanie Bogan: How you've put it in practice so that Cathy and Andrew and Melissa and everybody can figure out how to rip it off in a way.

757

01:43:30.990 --> 01:43:37.290

Stephanie Bogan: That they can own it when they put it into practice, so thank you again for that I hope this call was helpful to you all we've covered a ton.

758

01:43:37.770 --> 01:43:45.750

Stephanie Bogan: As always, any questions, we did not get to dinner, I will answer and try, we are there to continue to answer your questions and provide coaching.

759

01:43:46.140 --> 01:43:50.760

Stephanie Bogan: And we will see you on the April 12 call if we do not talk to you before then so with that.

760

01:43:51.150 --> 01:43:57.540

Stephanie Bogan: Make sure that you are really clear on not only how to communicate your value but you're getting clear in the main things that you need to focus on.

761

01:43:57.840 --> 01:44:10.200

Stephanie Bogan: As we move into the balance of the year we're going to really focus on how you deliver that value in a way that is efficient profitable and enjoyable so with that Thank you guys, for your time and attention and go do great things.

