

LIMITLESS Coaching Call Transcript

APRIL 12TH, 2021
LIMITLESS COACHING CALL

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00:02:23.400 --> 00:02:30.090

Stephanie Bogan: All right, everybody, this is the April limitless coaching call it today's April 12 and we're going to talk about communicating.

16

00:02:30.390 --> 00:02:41.910

Stephanie Bogan: and engaging with your value, so this year we've talked about clarity action accountability we've talked about packaging your value in terms of how you communicate who you do your best work with.

17

00:02:42.390 --> 00:02:46.470

Stephanie Bogan: How you tell your story in a clear, concise and compelling way.

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00:02:46.710 --> 00:03:01.140

Stephanie Bogan: And ultimately, how you message that out to the marketplace, in a way that creates the gravity that those ideal clients that are just right for your practice are drawn to you, so today I am quite excited because I had two guests with me.

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00:03:01.890 --> 00:03:08.040

Stephanie Bogan: Women that I have known and worked with over the course of my, what are we not 27 year career ladies that's a long time.

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00:03:08.070 --> 00:03:11.100

Stephanie Bogan: Julie can count that we're not we're not quite there yet.

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00:03:12.300 --> 00:03:20.190

Stephanie Bogan: um I can just carlton from fight calm and Julie little child from absolute engagement, I know that you are all both very familiar with them.

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00:03:20.970 --> 00:03:26.760

Stephanie Bogan: They are both friends and colleagues of mine so as we look at them a retreat around delivering value.

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00:03:27.060 --> 00:03:39.060

Stephanie Bogan: And I looked at the coaching calls in between our last retreat and that one it occurred to me that these would be two fantastic women to come on and really do what we wanted you in these in between coaching calls is unpack.



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00:03:39.450 --> 00:03:50.340

Stephanie Bogan: The content in terms of okay that's great I know how to apply it in my practice, but I really want to understand from the deeper perspective, how do I use this information in a way that elevates the value.

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00:03:50.610 --> 00:03:58.140

Stephanie Bogan: That I delivered on my clients ultimately to my practice and ideally to my life, so these two women are very much on board with that idea.

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00:03:58.830 --> 00:04:04.650

Stephanie Bogan: Both are incredibly gifted and talented at what they do, or would not have them here and why asked on tribe.

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00:04:04.920 --> 00:04:17.580

Stephanie Bogan: Who you'd like to have in this call it was no joke a split tie, so I was like well they're both friends, I want to invite them both so I'm happy to have both Candace and Julie, with me do you each want to say hello really quickly and then we'll do the deeper stuff.

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00:04:18.750 --> 00:04:22.740

Julie Littlechild: hey everybody excited to be here it's good to see an action step it's been a while.

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00:04:23.730 --> 00:04:26.130

Stephanie Bogan: It has been a little bit thanks for being here Julie.

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00:04:26.610 --> 00:04:44.550

Candice Carlton: I free white it's so lovely to be here at the step thanks for having me it's been really exciting and fun just preparing for this call so I'm really excited to be here with both Julie and Stephanie and all of you and I'm excited to see all your questions so thanks for having me yeah.

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00:04:44.580 --> 00:04:50.730

Stephanie Bogan: So, today, the special treat is that we have these two ladies with us, and as we move to the next slide.

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00:04:51.000 --> 00:04:56.640

Stephanie Bogan: What I really want to talk to you about is how we're going to use that time so we're going to talk about value.

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00:04:56.880 --> 00:05:02.520

Stephanie Bogan: Each of them are going to share a few minutes about their perspective on engagement and virtual value.

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00:05:02.820 --> 00:05:11.190

Stephanie Bogan: And then we're going to spend the rest of our call just really having we called it a jam session I'm



going to ask some questions we'll ask your questions will put you on.

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00:05:11.490 --> 00:05:26.310

Stephanie Bogan: really just helping you unpack this concept of value, how to really get it put it into action and different ways in your practice, so I want to pause here because before we do that this is also the beginning of quarter to.

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00:05:27.990 --> 00:05:36.660

Stephanie Bogan: So we're already one fourth of the way through the year and this year's coaching program so it's time to as I talked about in last week's coaching video.

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00:05:37.230 --> 00:05:47.850

Stephanie Bogan: it's time to look at your quarter one evaluate your progress so it's that formula that you hear me talk about over and over and over again, which is get clear.

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00:05:48.120 --> 00:05:52.380

Stephanie Bogan: Get focused and get to work, the issue is, we tend to get to work.

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00:05:52.710 --> 00:06:00.510

Stephanie Bogan: Then realize we're not focused create problems for ourselves, and then in the middle of those crisis find ourselves really needing to get clear.

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00:06:00.780 --> 00:06:09.720

Stephanie Bogan: Here we're going to slow down a little bit to speed up and we're going to start with that clarity that you hear me talk about so consistently, because it is absolutely true.

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00:06:09.960 --> 00:06:22.710

Stephanie Bogan: When your vision is clear your decisions are easy my book, it says heard me say this so many times, one of you actually texted me over the weekend, it was like Michael kits this was hung many times podcasts that he said that like 10 times.

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00:06:23.130 --> 00:06:28.800

Stephanie Bogan: So it is absolutely true, because when you're clear, you know where to focus.

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00:06:29.400 --> 00:06:34.620

Stephanie Bogan: In terms of your limited time and resources where even to put your time energy attention and team.

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00:06:34.950 --> 00:06:44.400

Stephanie Bogan: To truly move the needle in ways that work, not the busy work not that distracted work, none of those things, and then, when we have those two things clarity.

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00:06:44.730 --> 00:06:54.630

Stephanie Bogan: about how the quarter is gone so we've updated the personal launch plan this quarter to take you through a little bit of that coaching process, as you go through the process on your own.

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00:06:54.960 --> 00:07:01.440

Stephanie Bogan: And, or even with your mastermind group so we're going to ask you, those questions, what did you do this quarter relative to your goals.

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00:07:01.680 --> 00:07:09.330

Stephanie Bogan: What progress, did you make what God in your way, how could you have handled that how did you handle that and it's just a series of questions to help you get clear.

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00:07:09.630 --> 00:07:21.510

Stephanie Bogan: and get focused is you set those objectives and priorities for q2 remembering to keep the main thing, the main thing right if you can do one significant thing each quarter and do it well.

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00:07:21.960 --> 00:07:30.990

Stephanie Bogan: You are going to elevate your practicing and ultimately hit that hockey stick effect that we talked about so much so, some of you, I know you've been around a little bit.

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00:07:31.470 --> 00:07:41.490

Stephanie Bogan: Oh you're very clear, and that is coming to very easily some of you as you start to pivot into the delivering value or your next set of quarterly priorities might like some guidance and support.

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00:07:41.760 --> 00:07:49.440

Stephanie Bogan: So I sat down with Lisa and we carved out a little bit of extra time so on April 20 from 1232 two o'clock Pacific time.

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00:07:49.710 --> 00:07:55.500

Stephanie Bogan: i'm going to be on the line for an open office hours around all things strategy planning performance mindset.

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00:07:55.680 --> 00:08:04.560

Stephanie Bogan: Should I focus on this should I focus on that can I do these things at the same time, like any questions you have about what to do when to do it, how to do it with whom to do, which.

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00:08:04.980 --> 00:08:11.850

Stephanie Bogan: Please bring those questions and I will be happy to be there to support you answer your questions and make sure that you are starting the second quarter.

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00:08:12.090 --> 00:08:21.510

Stephanie Bogan: Clear focused and ready to work on the things that are going to really put you in a place to elevate your thinking your practice and your life, because that is why you are here.



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00:08:22.350 --> 00:08:30.270

Stephanie Bogan: Alright, so that is the check in on the personal launch plan that went out last one days inbox insight will include another copy this Wednesday.

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00:08:31.050 --> 00:08:36.180

Stephanie Bogan: Alright, everyone deep breath and to do this again right give her brains a transition point.

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00:08:37.110 --> 00:08:48.300

Stephanie Bogan: Now, what I want to talk to you about is sort of this, the one of the sort of the fabric of what we do here, which is really positioning you to be that trusted advisor.

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00:08:48.810 --> 00:08:55.350

Stephanie Bogan: Right you do work with clients that are motivated able to see the value in working with you, and not only willing, but happy to pay.

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00:08:55.650 --> 00:09:06.900

Stephanie Bogan: And, in exchange for that right that promise is that you're going to show up and deliver on your brand promise, whatever that is right for us it's elevating potential and happiness fi calm has there's.

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00:09:07.260 --> 00:09:14.910

Stephanie Bogan: Julie has hers and you each have yours right and we've talked about that, and if you're not clear on it right, those are things to come to coaching calls or tribes.

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00:09:15.270 --> 00:09:27.060

Stephanie Bogan: With questions about our go back through this branding lessons but, whatever your brand promise, it is, it is some form of some form of comfort confidence and clarity around people's financial lives.

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00:09:27.660 --> 00:09:39.510

Stephanie Bogan: But the value equation, I will call it is shifting and what I mean by that is, if you listen to me, or what i've been writing or Michael kids this and when he's been writing we actually did.

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00:09:39.960 --> 00:09:53.430

Stephanie Bogan: We actually did a webinar on it last year around kind of the shift to an experience economy where you have a focus on specialization in particular hyper specialization on that value chain.

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00:09:53.910 --> 00:10:07.830

Stephanie Bogan: You have a focus on personalization and you have focuses on experience and so again you have that value scale when I was candace is going to show a picture of Joe Duran in a minute I know because I sneak peek on the PowerPoint I get to do that.

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00:10:08.610 --> 00:10:18.780



Stephanie Bogan: Who we both worked with who's a brilliant visionary and one of the things that we did we had lunch with the salesforce CEO and he had this conversation around our bows.

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00:10:19.140 --> 00:10:31.950

Stephanie Bogan: And the barbell conversation was right you've got commodities on one in a sort of your low price high volume less touch and on the other end of that barbell you have rate booty low volume high quality.

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00:10:32.340 --> 00:10:42.660

Stephanie Bogan: And then you have the spectrum of people in the middle and what what the CEO of salesforce was articulating was that he was really seeing, and this was candace what would this be like 10 years ago at this point.

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00:10:42.780 --> 00:10:53.190

Stephanie Bogan: years and I would say you guys ladies feel free to jump in but like what what he essentially said was we're seeing a gravity to the ends of those barbell is like the most successful firms.

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00:10:53.580 --> 00:11:06.180

Stephanie Bogan: are either really deep on the boutique in the specialty side or really deep on the business model of right scale and volume and in the middle, is where firms are struggling and I would honestly say, based on my experience.

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00:11:06.630 --> 00:11:16.140

Stephanie Bogan: that's very true in financial services, which is why we are always talking about getting really clear on the client you're going to serve right that niche and that ideal client.

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00:11:16.500 --> 00:11:33.780

Stephanie Bogan: delivered deep value to a few clients really deep massive value, as opposed to very thin value to a lot of science here's what I want you to think about and Julie and candace are both going to add really fast fantastic perspectives around this is what value.

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00:11:33.840 --> 00:11:34.920

Candice Carlton: Is is something that you.

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00:11:34.920 --> 00:11:43.140

Stephanie Bogan: need to understand and to understand how it's changing understand that value is nothing more than idea it's a perception it's a story.

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00:11:43.590 --> 00:11:52.710

Stephanie Bogan: of value that I give an experience and outcome right, something that i'm experiencing ultimately all about feelings you guys have heard me talk a lot about that.

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00:11:53.700 --> 00:12:01.950

Stephanie Bogan: It used to be in particularly in financial services that the value is very tangible, I will manage your investments, I will give you this alpha.



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00:12:02.190 --> 00:12:08.220

Stephanie Bogan: I will do X, Y or Z for you, you will buy this life insurance product, it will do right, I will be there when the phone rings.

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00:12:08.760 --> 00:12:17.100

Stephanie Bogan: Where is now what you're seeing in that value shift is the products are moving to the left side of the barbell or the commodity and scale side.

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00:12:17.400 --> 00:12:25.380

Stephanie Bogan: Investments right and just anything you can go buy from anyone, and then on the right side or that value what I call the value side of the barbell.

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00:12:25.680 --> 00:12:35.310

Stephanie Bogan: Where you've got the more boutique is where you're really leaning into this idea of the intangible value is advice which we're going to talk a ton about and may with Carl richards.

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00:12:35.760 --> 00:12:44.280

Stephanie Bogan: It is not just not the paper it is not the projections it's, not even the financial plan anymore it's really about the exchange of value.

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00:12:44.940 --> 00:12:53.820

Stephanie Bogan: between you and a client every study done this far, but I just looked at one a couple weeks ago that what people want when they hire a financial planner the number one thing they want is.

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00:12:54.240 --> 00:12:57.630

Stephanie Bogan: Someone to help them achieve their goals that's what they want every.

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00:12:57.990 --> 00:13:03.300

Stephanie Bogan: Now, the more you know about the client and where they are in the life cycle and their profession, all the things we talked about.

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00:13:03.540 --> 00:13:14.220

Stephanie Bogan: The better you can serve that but also the more that you understand that value is a perception it's a story it's a feeling it's an experience that someone has.

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00:13:14.700 --> 00:13:23.130

Stephanie Bogan: And those intangibles are what put you on the right side of the value chain it's why people will pay a premium is for that personal boutique relationship.

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00:13:23.460 --> 00:13:34.380



Stephanie Bogan: If your business model is on the scale side right, then that should be your business model and you want to make sure that your business is built around that there's no right or wrong business model and my experience.

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00:13:34.770 --> 00:13:41.880

Stephanie Bogan: there's saying that you have one and building to the other or building too many others because you're trying to be all things to all people.

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00:13:42.300 --> 00:13:49.680

Stephanie Bogan: So I want to use that as a frame for our conversation, which is, as we talk about move the shift from talking about.

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00:13:49.980 --> 00:14:01.170

Stephanie Bogan: communicating our value in the last quarter now we're going to talk about how do you engage and deliver that value, and I think in today today's age, in particular, we really want to talk about.

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00:14:01.410 --> 00:14:07.080

Stephanie Bogan: How to do that in a virtual environment because no matter what as the world goes back to some sense of normal.

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00:14:07.290 --> 00:14:15.780

Stephanie Bogan: Whether you like it or not, or agree with it or not, you are now all virtual advisors in some form, you will have virtual practices, you will have clients that say.

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00:14:16.290 --> 00:14:26.850

Stephanie Bogan: Actually, can we just do those reviews by zoom that was pretty easy and we'd have to get in the car we didn't have to kill two hours of our day so that's a frame for the conversation going forward.

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00:14:27.450 --> 00:14:35.910

Stephanie Bogan: And with that I really just want to talk about the engagement cycle, which is, it is not a thing that you do engagement is a process.

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00:14:36.360 --> 00:14:46.890

Stephanie Bogan: Not an event, just like planning is a process and not an event, and there are layers to everything that you do it's not just pick up the phone is how are they thinking.

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00:14:47.220 --> 00:14:58.650

Stephanie Bogan: What touch point is here, how are they feeling, how does this deliver on the process what other work is this connected to Am I using this as an opportunity to articulate value what's the right way to do that.

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00:14:59.040 --> 00:15:05.610

Stephanie Bogan: all the way from defining it in the sales and marketing phase to packaging it right in the branding and the presentation phase.



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00:15:05.880 --> 00:15:22.380

Stephanie Bogan: Communicating it as they come on board and then delivering that value over time, that is, the engagement cycle it's not a meeting or a moment it is the entire client experience so with that we're going to turn it over to let's see who do we have teed up first Julie.

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00:15:23.550 --> 00:15:32.310

Stephanie Bogan: You want to talk a little bit about absolute engagement and just where client can have your view on client engagement and how that fits into what we've been talking about.

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00:15:32.490 --> 00:15:43.650

Julie Littlechild: yeah absolutely so I mean, first of all suffering, I think that what you just said is such a great way to segue into this this idea that engagement isn't just.

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00:15:44.070 --> 00:15:49.830

Julie Littlechild: An event but a process and it's something I think that's so important, and the other thing to notice, I think, is.

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00:15:50.370 --> 00:15:58.620

Julie Littlechild: Is that we when we think of engagement there's two parts of it it's a verb right to engage, how do we engage our clients, but it's also.

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00:15:58.890 --> 00:16:05.220

Julie Littlechild: A measurement and outcome, I have an engaged client and both of those things again they take us down different paths, but I think it's.

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00:16:05.460 --> 00:16:11.370

Julie Littlechild: is important so there's a few things I thought it might be helpful to just throw out there and see if we can get some conversation going.

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00:16:11.760 --> 00:16:21.180

Julie Littlechild: A one I wanted to talk about setting engagement is the standard, first of all like actually having a more aspirational standard than I think most of the industry has.

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00:16:21.450 --> 00:16:32.760

Julie Littlechild: Today, I wanted to talk about how we get there some of the ways we can design an experience that's engaging and then how we ensure that we're doing that in the right way.

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00:16:33.510 --> 00:16:39.510

Julie Littlechild: So I mean just first of all on this first point, this idea that engagement is a higher standard.

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00:16:39.870 --> 00:16:47.310

Julie Littlechild: Look 90% of clients out there are satisfied right, you referred to some industry research i'm sure it



found the same thing.

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00:16:47.550 --> 00:16:56.490

Julie Littlechild: Our new research is coming out soon as well, so it'll be interesting to see how clients have have are thinking now sort of a year into to this mess.

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00:16:57.060 --> 00:17:10.110

Julie Littlechild: But when 90% of clients are satisfied, then it doesn't set you apart, to have satisfied clients and it's it's kind of hard to hear that because it's not easy to have satisfied clients right, I mean we've we've got to get a lot of things right.

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00:17:10.470 --> 00:17:13.230

Julie Littlechild: For clients to say that they're satisfied.

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00:17:13.740 --> 00:17:19.530

Julie Littlechild: But knowing this group, and knowing you know the kinds of things that you focus on, I think.

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00:17:19.770 --> 00:17:26.430

Julie Littlechild: we've got to say look that's for the rest of the industry they're trying to get to satisfied we're trying to get to engaged.

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00:17:26.670 --> 00:17:34.620

Julie Littlechild: And so, how do we do that we haven't we actually have a definition that we use from a research perspective, which is getting you know quite granular.

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00:17:34.890 --> 00:17:41.910

Julie Littlechild: But an engaged client is someone who is a five out of five on satisfaction, but has also provided a referral.

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00:17:42.600 --> 00:17:51.990

Julie Littlechild: And so we try to tease those people out of our data set and say you know what can we learn about like what's different about those relationships, what makes them.

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00:17:52.440 --> 00:18:04.740

Julie Littlechild: feel so good about relationship that they are continuous advocates for their advisors and there's only about a third of clients that fall into that category so much more aspirational.

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00:18:05.310 --> 00:18:12.990

Julie Littlechild: Now you know if we kind of start there, then I guess the next question is just how do we go about designing and and on the next slide.

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00:18:13.350 --> 00:18:22.140

Julie Littlechild: you'll see one approach which i'm sure you've heard of but but we'll talk about and it's client journey mapping and and I think the point.

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00:18:22.620 --> 00:18:32.310

Julie Littlechild: That might be interesting to talk about is there is, I mean you know there's no silver bullet, there is no tactic, that is, the tactic that will drive engagement.

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00:18:33.360 --> 00:18:40.980

Julie Littlechild: But designed to me is the true differentiator right if we can actually design the experience in a different way.

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00:18:41.400 --> 00:18:52.770

Julie Littlechild: Then it will be a differentiated experience, and I think client journey mapping is one of the ways that we can do that, so you know I mean just in a nutshell, and there's a lot to it.

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00:18:53.910 --> 00:19:02.460

Julie Littlechild: there's really four questions if we wanted to distill it down to the most important parts of this, you know step one and stephanie you mentioned this.

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00:19:02.700 --> 00:19:07.770

Julie Littlechild: Who are you designing the client experience to support right it's not for everyone.

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00:19:08.130 --> 00:19:12.570

Julie Littlechild: And I think that's the most fundamental question that we can ask if we haven't answered that.

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00:19:12.870 --> 00:19:20.220

Julie Littlechild: you're going to automatically start creating an experience that will offend No one and will engage, no one at the same time right.

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00:19:20.610 --> 00:19:29.670

Julie Littlechild: And so that's number one who am I designing this just to support the second is, what are the stages that these clients go through, and you see an example here.

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00:19:30.390 --> 00:19:36.480

Julie Littlechild: And in the key with client journey mapping, is that there isn't a prospect experience in a client experience.

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00:19:36.720 --> 00:19:44.640

Julie Littlechild: there's an experience, you know as human beings, we don't think i'm a prospect now and i'm a client there it's just our lives that we're going through.



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00:19:44.970 --> 00:19:50.730

Julie Littlechild: And it starts from you know just figuring out, I have a need, you know i'm sitting on the couch.

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00:19:51.270 --> 00:20:01.020

Julie Littlechild: talking to my husband, with a glass of wine saying, are you know, are we gonna be all right, or you know what are we doing the right things we don't even know we need an advisor that's the start of this journey.

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00:20:01.500 --> 00:20:10.740

Julie Littlechild: From there, we might do some research based on that research, I might read some articles read a book reach out to you as an advisor on that basis we might meet.

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00:20:11.280 --> 00:20:21.840

Julie Littlechild: If all goes well you'll onboard me there'll be ongoing reviews ongoing communication, and so the point of client journey mapping is first of all to map out those stages get them clear in your head.

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00:20:22.200 --> 00:20:31.620

Julie Littlechild: And then say what are my clients thinking feeling and doing at each stage and as importantly, what are they thinking feeling and doing in between those stages.

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00:20:32.160 --> 00:20:44.730

Julie Littlechild: And that's a design approach right, it will it'll start to unearth these opportunities to say hmm you know when they're coming into reviews sometimes they're not on the same page or.

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00:20:45.030 --> 00:20:48.540

Julie Littlechild: When when you know they reached out and looked at my website.

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00:20:48.960 --> 00:20:58.410

Julie Littlechild: They were feeling a level of anxiety, or whatever, that is what are they thinking feeling and doing what are their challenges, what are their concerns what are their needs and when we can get a.

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00:20:58.890 --> 00:21:08.940

Julie Littlechild: Real handle on that we can start to create an experience that targets those needs, which is really the first step here like what can I do to support clients.

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00:21:10.440 --> 00:21:23.850

Julie Littlechild: So there's a well worn path to journey mapping, but it is very much a design approach so i'd say that's you know that's something that's definitely on our minds is how do we do that, but there is there's also just that one final point.

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00:21:24.840 --> 00:21:36.030

Julie Littlechild: And that is you know, once we go through this process, how do we know what's actually engaging for our clients or to your point like, how do we know what they value.



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00:21:36.660 --> 00:21:46.800

Julie Littlechild: And so my The last thing I wanted to make and you'll see this on the next slide is just is more of a caution than anything else and that's simply that you are not a proxy.

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00:21:47.190 --> 00:21:55.920

Julie Littlechild: For your client's needs and expectations, and it is, it is tempting to believe we are, because we know them so well so it's tempting to say.

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00:21:56.250 --> 00:22:01.710

Julie Littlechild: I know the kind of experience, they want I know where their challenge, therefore, this is what they need.

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00:22:02.370 --> 00:22:09.360

Julie Littlechild: We can't lead with assumption and that's really what ultimately certainly leads into the work that we live and breathe every day.

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00:22:09.660 --> 00:22:19.920

Julie Littlechild: Which is how do we integrate the voice of the client into this process, so not so that we can understand just what do they expect, but so that we can understand.

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00:22:20.430 --> 00:22:25.290

Julie Littlechild: Where they challenged, what do they need what are their big concerns what keeps them up at night.

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00:22:25.710 --> 00:22:33.360

Julie Littlechild: And, and then it's your job to figure out the experience that meets those needs it's not your clients job to tell you what that experience should be.

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00:22:33.750 --> 00:22:49.980

Julie Littlechild: And so you know that's really kind of the third area I think here is just, we need a formal process to make sure that we are looping the client in and co creating the client experience with them so few thoughts to get us started.

149

00:22:53.430 --> 00:22:54.390

Julie Littlechild: Here muted stuff that.

150

00:22:54.480 --> 00:23:03.780

Stephanie Bogan: I realized that yeah so i'll ECHO, one of the things that Julie, said that I really want to highlight and again we're going to talk some more enjoyable do back in the main retreat to go deeper into all of this.

151

00:23:04.080 --> 00:23:16.980



Stephanie Bogan: Is I cannot tell you how many times in two almost three decades now, I have had clients good advisors good people intelligent grounded say to me, oh no, no, no, my clients won't do that.

152

00:23:17.310 --> 00:23:17.430

Stephanie Bogan: I.

153

00:23:17.730 --> 00:23:23.790

Stephanie Bogan: will be okay with that my clients my investment clients, I know I know Bob and Sue Bob and Sue are not going to be interested in planning.

154

00:23:24.180 --> 00:23:32.370

Stephanie Bogan: Oh, like and every time that we go through a process of simply understanding that our job is not to be the proxy is Julie said.

155

00:23:32.760 --> 00:23:41.070

Stephanie Bogan: Your job is to be great that educator your job is to give clients, the information they need to make informed and educated choices.

156

00:23:41.490 --> 00:23:49.650

Stephanie Bogan: about their financial life and the opportunity to make one as a prospect that's about working with you, but as a client, it might be about.

157

00:23:49.890 --> 00:23:57.420

Stephanie Bogan: Are these services things that you'd be interested in, you know, are you comfortable with X, Y or Z have we talked about these things before.

158

00:23:58.290 --> 00:24:04.860

Stephanie Bogan: I know in Julie surveys, for example, right there's you know those entry, you know things we want to talk about and things we have talked about.

159

00:24:05.340 --> 00:24:12.750

Stephanie Bogan: And I cannot tell you it's why, if you go to the engagement standards and some of the examples that we've posted around service menus.

160

00:24:13.050 --> 00:24:19.650

Stephanie Bogan: Where you list out the different things that you can do because clients are literally like Oh, I had no idea that you do those things.

161

00:24:20.070 --> 00:24:30.450

Stephanie Bogan: So your job is to understand what levers, you can help plans full put those in front of them and then to julie's point create a really engaged experience around that.

162



00:24:30.810 --> 00:24:37.950

Stephanie Bogan: Through the actions and the lens of thinking feeling and doing what you've heard me talk a lot about, so I think that's a good grounding.

163

00:24:38.370 --> 00:24:43.890

Stephanie Bogan: And then, what I want to do is now shift gears and have, and I know you've got some questions, so we will open it up.

164

00:24:44.310 --> 00:24:52.320

Stephanie Bogan: I want to have candace come in and talk about, because it is so important and timely right now so much of the engagement that Julie is talking about.

165

00:24:52.680 --> 00:24:57.570

Stephanie Bogan: And that we're talking about in terms of the client experiences and the systems that we're building.

166

00:24:57.930 --> 00:25:06.300

Stephanie Bogan: are delivered virtually even in a world where you're sitting across from your clients once or twice a year, and I think you're going to see those numbers shift a little bit.

167

00:25:06.660 --> 00:25:13.680

Stephanie Bogan: But even in that world greater than half or 60 or 70% depending on the number of touch points you have.

168

00:25:14.130 --> 00:25:21.450

Stephanie Bogan: is going to be virtual it's going to be delivered in the mail or by email or possibly by video which candace is going to talk to us about.

169

00:25:21.840 --> 00:25:30.750

Stephanie Bogan: So we really think about as we go through and we're really building into the may retreat but we're doing this, so that you start to get that grounding in.

170

00:25:31.080 --> 00:25:42.870

Stephanie Bogan: value and virtual value is something that I want you to be very consciously thinking about how to add to your repertoire because it's something you're going to be doing in every phase of the life cycle going forward.

171

00:25:44.610 --> 00:25:46.530

Stephanie Bogan: Alright candace tag you're it.

172

00:25:47.280 --> 00:25:54.180

Candice Carlton: Thank you it's so lovely to be here so i'm head of advisor education, I come partners so I coach advisors like you.



173

00:25:54.660 --> 00:26:04.800

Candice Carlton: And for most of my job, sometimes i'm working with marketing and communications team and I always are working advisor so lovely to be here with all of you, thanks for having me.

174

00:26:05.460 --> 00:26:16.230

Candice Carlton: So I think what's really important, if you think about your story that you are sharing your value that you're articulating but, more importantly, that you're demonstrating.

175

00:26:16.470 --> 00:26:31.950

Candice Carlton: To prospects and clients virtual is here to day, so when i'm working with advisors on defining their story or telling their story there is really a targeted focus that we have on it, and the first bullet point that we say to all our advisors in.

176

00:26:32.640 --> 00:26:42.300

Candice Carlton: Being new school not old school so we've got Joe Duran here who used to be the CEO of united pop up that was acquired by Goldman Sachs we've definitely and I.

177

00:26:42.510 --> 00:26:48.900

Candice Carlton: Both work there together at the same time, so we can use them as a good visual because I think you just demonstrate that so beautifully.

178

00:26:49.410 --> 00:26:58.650

Candice Carlton: Traditionally, in financial services, all our marketing or communications even our plant touch points were really surrounded around this idea of creating credibility.

179

00:26:58.980 --> 00:27:09.180

Candice Carlton: So advisors, being the expert, you know and a lot of the marketing and communications that you'll see it's really over professional language it's kind of like a top down expert.

180

00:27:09.600 --> 00:27:14.820

Candice Carlton: But we know that the advisor client relationship has changed the same way.

181

00:27:15.090 --> 00:27:23.790

Candice Carlton: Our relationship with our medical professional has changed right before used to go to the doctor, whatever the doctor said you would listen to and you would say and do.

182

00:27:24.060 --> 00:27:31.440

Candice Carlton: Now, you know that you have to be an advocate for your own health you've done the research you push back you have second opinions you speak.

183

00:27:31.680 --> 00:27:35.850

Candice Carlton: holistic alternatives and we're seeing that more and more, and I know you are with your clients.



184

00:27:36.210 --> 00:27:44.220

Candice Carlton: it's a much more collaborative relationship, they want transparency into not only their fees, but the process what it means for them.

185

00:27:44.610 --> 00:27:54.870

Candice Carlton: and, more importantly, clients are looking for an advisor that they feel comfortable with calling when you when they've had a massive life event right when their spouse passes away when.

186

00:27:55.110 --> 00:28:04.500

Candice Carlton: something unexpected happens so if you're showing up in your marketing and communications which i'll get to in a second I think historically we've looked at more like.

187

00:28:04.740 --> 00:28:14.940

Candice Carlton: social media YouTube that type of vibe, but when we think about it we're really thinking as Julie mentioned, which is, by the way, it's lovely to be here with stephanie and Julie, because i'm often.

188

00:28:15.420 --> 00:28:25.530

Candice Carlton: The only one preaching this it's lovely to be in that cohort, but when you think about connecting with your prospects and your clients from a marketing and communications perspective.

189

00:28:25.800 --> 00:28:32.820

Candice Carlton: we're not just talking about like social media and flashy and all that type of thing we're talking about it across your entire experience.

190

00:28:33.120 --> 00:28:39.600

Candice Carlton: So, by the time a prospect actually has their first meeting with you, they feel like they already know you write.

191

00:28:39.780 --> 00:28:52.980

Candice Carlton: That you have these touch points with your clients in between your two semi annual meetings so that they feel like they know your they've received value from you, and they seen you multiple points during the day and that's really that digital first.

192

00:28:53.280 --> 00:29:02.730

Candice Carlton: approach and that's what's going to help you if you're utilizing a virtual approach day in front of your clients in a way that's really meaningful and impactful for you.

193

00:29:03.090 --> 00:29:07.110

Candice Carlton: I remember when call that just had all of a sudden, we had some the Barclays say.

194

00:29:07.410 --> 00:29:16.680



Candice Carlton: they're so crazy because they've had really like high net worth clients reach out to them, because when coven happened and everything was going on, they were like I didn't hear from my advisor.

195

00:29:16.920 --> 00:29:24.150

Candice Carlton: Where was my advisor and all of this, so the advisors that we're seeing, which I know all of you are really successful in building.

196

00:29:24.600 --> 00:29:35.310

Candice Carlton: That trust that engagement, but also long lasting relationship and expanding wallet share are staying in front of their clients consistently and utilizing virtual.

197

00:29:36.060 --> 00:29:45.540

Candice Carlton: So start going back to what is old school versus new school so new school is really thinking about your touch points as an opportunity to drive connection.

198

00:29:46.140 --> 00:29:54.420

Candice Carlton: Using human to human language and showing up authentically so we define new school as showing up authentically.

199

00:29:54.690 --> 00:30:03.720

Candice Carlton: Having a very targeted focus, which both stephanie and Julie have spoken to for your know exactly who you're speaking to you know it's speaking to 10s of.

200

00:30:04.080 --> 00:30:18.720

Candice Carlton: People and that you're driving towards commercial success so you're doing it to grow your business is really using your marketing communications your prospect and client touch points to do that to like drive to the success so value and then for you.

201

00:30:19.140 --> 00:30:24.630

Candice Carlton: I think the second point which you can see, really beautifully here and i'd love to just get a quick poll so.

202

00:30:25.170 --> 00:30:40.200

Candice Carlton: He could type into the chat box we've got all school Joe so let's call him a we've got new school Joe let's call when be you know it's the same person who would you rather have coffee with, and if you could just type that into the chat box, please.

203

00:30:42.060 --> 00:30:54.510

Candice Carlton: hey lots of beef, sometimes we get a US beef beef beef all right, and then, if you could just chat type into the chat box why, if you could just give me like a little bit about like why.

204

00:30:56.280 --> 00:30:59.040

Stephanie Bogan: Dan Dan souter said i'll have coffee with anyone to be.



205

00:31:02.250 --> 00:31:03.600

Julie Littlechild: Low bar or so yeah.

206

00:31:04.230 --> 00:31:09.450

Candice Carlton: let's relax yeah friendly okay.

207

00:31:10.710 --> 00:31:20.550

Candice Carlton: assume he's the real deal good listener fight it's so interesting right, I think, financial advisors we've been taught the context of must show up seriously.

208

00:31:20.760 --> 00:31:28.260

Candice Carlton: Much create credibility when the truth is like you're a human your clients are human and they're looking for that human to human connection.

209

00:31:28.590 --> 00:31:39.960

Candice Carlton: So I remember you know to capital and I think stephanie might have remembered This too is like there was a big decision, one day, and the big decision was to really go in this frame.

210

00:31:40.530 --> 00:31:46.350

Candice Carlton: This new school frame and it was the men weren't even aware ties to work any more Do you remember that stephanie.

211

00:31:48.090 --> 00:31:57.510

Candice Carlton: That was like a big decision, but it was it was a visual cue of like how things were going to shift and change right.

212

00:31:57.930 --> 00:32:10.770

Candice Carlton: And I think that goes to a second point, your clients are looking for authenticity over production value any day and every day, so you know there's so much I we think about.

213

00:32:11.820 --> 00:32:17.940

Candice Carlton: Just social media as an example, so if you're looking at your prospects and that awareness cycle, but also staying in front of.

214

00:32:18.270 --> 00:32:25.080

Candice Carlton: If you're shooting videos for your clients, for example in between client meetings there's a tendency and desire to want to.

215

00:32:25.470 --> 00:32:40.860

Candice Carlton: Perfect you know to like really look beautiful to like have an old fancy I have a lot of advisors



comes to my workshops and they start asking me questions like how do I do a two cameras set up and getting really like you know, like fancy I don't know any other word to say that.

216

00:32:41.910 --> 00:32:50.700

Candice Carlton: But what we find is you know your clients, if you shot a video on your phone and you're like i'm getting a lot of these questions, this is what's happening.

217

00:32:50.940 --> 00:32:59.910

Candice Carlton: And you sent out a video there's a certain resonance around it, where they feel like you're really being of service that you're there to help them and so.

218

00:33:00.360 --> 00:33:14.520

Candice Carlton: we're just seeing that again and again, and then the last point here is yes, I will judge you by your technology so if you're in this virtual setting and world really being up to date with.

219

00:33:15.120 --> 00:33:25.500

Candice Carlton: Technology so, for example, we were discussing like I like no offense but like let's just be honest here remember when Kobe hit and like people had go to meeting and I was like.

220

00:33:26.130 --> 00:33:28.110

Candice Carlton: Can we get on to the right like.

221

00:33:29.640 --> 00:33:31.860

Stephanie Bogan: that's like who do I have to click the button.

222

00:33:32.130 --> 00:33:32.670

Candice Carlton: yeah and.

223

00:33:33.300 --> 00:33:37.410

Candice Carlton: Sometimes, some people i'm working both there and Microsoft teams and i'm like ooh.

224

00:33:37.740 --> 00:33:43.710

Candice Carlton: Because it's clunky I have to like find my way around it, and the same way in this example like.

225

00:33:43.980 --> 00:33:57.510

Candice Carlton: Joe is visually queuing that he's up to date he's with the times he's relatable your technology is like sending signals to your prospects and clients in terms of like how you work so here's the thing.

226

00:33:57.870 --> 00:34:05.370

Candice Carlton: If your clients don't really care, and you know that maybe you don't need to care that much but generally speaking they've done a lot of research on it.



227

00:34:05.700 --> 00:34:08.820

Candice Carlton: And the more high net worth a client becomes, the more digital they become.

228

00:34:09.300 --> 00:34:17.850

Candice Carlton: If you think about kind of like a Mr tesla you know we're all ingrained and learning how to use our technology, I even think about like how amazing the apple phone is.

229

00:34:18.180 --> 00:34:24.420

Candice Carlton: They do a software, update and somehow we all find where the new thing is no one's lenses training.

230

00:34:24.660 --> 00:34:33.300

Candice Carlton: No one announces it, but we just see that things on our phone have changed now we're like ooh I used to be able to do this now I can't and we find our way.

231

00:34:33.510 --> 00:34:44.370

Candice Carlton: So we're all technology enabled and savvy and I think savvier than we think we are so i'm just going to pause there for a moment, see if there's any questions or comments before we roll to like the next slide.

232

00:34:44.970 --> 00:34:46.950

Candice Carlton: steph anything you want me to bring up.

233

00:34:47.850 --> 00:34:52.830

Stephanie Bogan: No go ahead i'll i'll kind of do some transition thoughts when you're done and then we'll go into some questions.

234

00:34:54.690 --> 00:34:55.650

Candice Carlton: Okay anyone.

235

00:34:58.590 --> 00:35:03.000

Stephanie Bogan: looks like Steve has a question, do you see this shift across all age groups.

236

00:35:03.330 --> 00:35:09.300

Candice Carlton: yeah I think it's answer are usually about client Steve or he's cooking about advisor specifically.

237

00:35:11.100 --> 00:35:11.520

Steve Cruice: Talking about.

238

00:35:12.300 --> 00:35:17.820



Candice Carlton: yeah plants, the shift to technology and like being more authentic with their advisor.

239

00:35:19.140 --> 00:35:27.150

Candice Carlton: yeah we've seen it across the board, you we've seen that, like across the board of all ages all categories and again that's that comment of like.

240

00:35:27.630 --> 00:35:40.410

Candice Carlton: will hear like oh you mean this is just for the younger clients, or like our our clients grandchildren and we're finding that that's not the case, the clients again are like you're you're the.

241

00:35:41.550 --> 00:35:55.170

Candice Carlton: More 10 year I don't know what the word is to stay more established clients are on their phones they're watching videos now they're on Facebook quite a lot so they're really engaged and Facebook and so we're seeing that across the board.

242

00:35:57.000 --> 00:36:10.950

Stephanie Bogan: No, I think that's a great point and that's actually probably a good transition question for the two of you, you as well Julie, which is, I know, when I was at united, and we were redesigning the practice model and in particularly advice model, which is obviously a really big deal.

243

00:36:12.060 --> 00:36:21.300

Stephanie Bogan: We really move to that interactive model right so you've got right I think candace made a really good point so I want you all to write this one down.

244

00:36:21.660 --> 00:36:29.970

Stephanie Bogan: which was when we were at united we did a lot of research around this and that shift that she talked about I call it the shift from patriarch to partner.

245

00:36:30.450 --> 00:36:37.320

Stephanie Bogan: People don't want to be told what to do they want a trusted advisor to give them the information they need and to be there to help them make.

246

00:36:37.680 --> 00:36:49.050

Stephanie Bogan: Good and confident choices, to the best of their ability and so, if you think about that Julie and candace in you know sort of interactive meetings and now virtual meetings.

247

00:36:49.410 --> 00:36:58.080

Stephanie Bogan: How many touch points, would you say are good overall Julie and then do do you have any feedback on or can just like how many of those.

248

00:36:58.380 --> 00:37:05.430

Stephanie Bogan: Is it good because we're going to be going into service models at the May retreat right and taking them through the process, so how many of those is a good to have in general.



249

00:37:05.760 --> 00:37:12.360

Stephanie Bogan: Julie, based on research, if you've got anything there and then candace any feedback on what are best practices around.

250

00:37:12.870 --> 00:37:20.370

Stephanie Bogan: Virtual I know we're going to talk a lot about this at your session in May, but in terms of you know prospecting and onboarding and delivery any feedback, there would be great.

251

00:37:21.390 --> 00:37:33.090

Julie Littlechild: So when we do the the investor research, the challenge, there is that the answer to how often do you want to connect is always it depends right, so what I mean by that is.

252

00:37:33.510 --> 00:37:46.500

Julie Littlechild: When the communications are valuable, I have a very high tolerance for receiving a lot of communication when it's not I don't, and so I think it's it always comes back to you know, do we actually understand.

253

00:37:46.830 --> 00:37:55.650

Julie Littlechild: Their needs and concerns and challenges and then are we Personalizing the way that we communicate based on that and and that opens up.

254

00:37:56.340 --> 00:38:06.450

Julie Littlechild: opens up a lot of doors and I, and I think that's part of this idea of more interactive and I, this may be taking in a slightly different direction and just slapped me down if it is, but.

255

00:38:06.960 --> 00:38:16.500

Julie Littlechild: You know, one of the things that that we've seen a real shift in is you know we do client feedback all the time and in the past, it was always sort of a point in time survey.

256

00:38:16.830 --> 00:38:27.600

Julie Littlechild: Every 18 months i'm going to gather feedback and that'll get me through the next 18 months, where we've shifted is actually gathering input as clients are coming into a review meeting.

257

00:38:27.870 --> 00:38:41.730

Julie Littlechild: So that it co creates a different kind of conversation, so that you can understand what's on their mind right now, and that should drive your conversation that's a different form of interaction, but I think it's part of what we're seeing.

258

00:38:42.660 --> 00:38:47.850

Stephanie Bogan: I love that idea right a really just in embedding it in the process, as you go.

259

00:38:48.270 --> 00:38:57.570



Stephanie Bogan: So we'll definitely want to talk more about that in May for sure, but you you all feel free to ask questions about that I can just order your and I think I would wholeheartedly agree with Julie.

260

00:38:58.020 --> 00:39:06.210

Stephanie Bogan: In that you know we've talked about this so much of what you do isn't isn't visible to the client and your job is to make the invisible.

261

00:39:06.570 --> 00:39:14.190

Stephanie Bogan: visible and you have to be smart about that you don't send them right a trade report every single time right a trade execution happens that's annoying.

262

00:39:14.550 --> 00:39:22.020

Stephanie Bogan: But when you do that quarterly investment review, even though it's not the focus, even though right you still might want to have a communication around that hey.

263

00:39:22.260 --> 00:39:27.720

Stephanie Bogan: We made a promise we kept a promise here's what we do every quarter we looked at X y&z everything is good.

264

00:39:28.380 --> 00:39:37.140

Stephanie Bogan: candidates will talk about right, you can do that in video Now you can do it with communications, but like what we'll talk as we go into the may retreat and the service model lesson.

265

00:39:37.560 --> 00:39:47.070

Stephanie Bogan: around what are your standard services right you're you know, everybody gets this and you're going to hear me and Julie in Canada say this until we're blue in the face and there's a reason for it.

266

00:39:47.550 --> 00:39:55.740

Stephanie Bogan: It works and we're trying without any disguises to convince you to focus on a target group of clients, because your job.

267

00:39:56.100 --> 00:40:04.920

Stephanie Bogan: in delivering deeper value is not to do more work is to do more meaningful work that is utterly focused on the client.

268

00:40:05.280 --> 00:40:09.450

Stephanie Bogan: And to what you heard Julie say their needs, their feelings their perception so that.

269

00:40:09.660 --> 00:40:16.530

Stephanie Bogan: If you're using video the way that candace will show you and teach you how you might be reading something in a magazine that's applicable to.

270



00:40:16.740 --> 00:40:23.610

Stephanie Bogan: Half your clients are all of your clients you jump on and you do a quick two minute loom video and that becomes the next month, you know.

271

00:40:23.880 --> 00:40:29.400

Stephanie Bogan: That quarters personal touch point and like boom you're done and the authenticity is there.

272

00:40:29.610 --> 00:40:39.570

Stephanie Bogan: The value is there are you can do a video we're talking through all the very boring things that you do to communicate value so there's a lot of ways to do it so just remember your job is to.

273

00:40:39.840 --> 00:40:53.460

Stephanie Bogan: alienate a lot of people so that as you're applying what Julie and candace are teaching you, you were custom fitting it to the clients that you're trying to attract and the clients that you're serving that you're delivering that value to.

274

00:40:53.970 --> 00:40:55.440

Stephanie Bogan: Yes, sorry.

275

00:40:55.650 --> 00:41:02.640

Julie Littlechild: Go ahead, I was just gonna say like highlight the Patriarch to partner, I think when when you shift in that mindset into the role.

276

00:41:02.910 --> 00:41:16.650

Julie Littlechild: I think a lot of this happens, naturally right the Patriarch notion is here's what you need to understand a partner is more about curiosity right and and truly wanting to understand what's going on and supporting so I thought that was great.

277

00:41:17.400 --> 00:41:22.320

Stephanie Bogan: Great way, to put it, you know we started this working united when candace and I were there and I.

278

00:41:22.590 --> 00:41:33.390

Stephanie Bogan: Like taking it even like, as I think through it now, we have fast forward 10 years and the advice account, you know how everything is really about advice in terms of the value and shifted the experience economy is that.

279

00:41:33.810 --> 00:41:38.850

Stephanie Bogan: At the end of the day, what i'm realizing I just wrote it down because I wanted to know, sometimes forget.

280

00:41:39.150 --> 00:41:53.670

Stephanie Bogan: Is you're curating an experience that's all you're doing like financial planning is a process, it is not



an event it's not a series of events strung together, it is about what people think feel and how they act on.

281

00:41:54.090 --> 00:42:00.210

Stephanie Bogan: The how they weave through those series of events and you need to understand and again we're gonna talk more about the details of this.

282

00:42:00.600 --> 00:42:07.350

Stephanie Bogan: They have a thought and a feeling around every single interaction, whether it's a trade execution report that they're like oh.

283

00:42:07.590 --> 00:42:14.460

Stephanie Bogan: That you need to prepare them for so right, so they don't attribute that to you or this huge amazing thing that you're going to do for them.

284

00:42:14.940 --> 00:42:23.910

Stephanie Bogan: Everything has a positive or negative and if it's a neutral experience that in my book it's a negative because that's an opportunity cost, you should exert no effort.

285

00:42:24.240 --> 00:42:32.280

Stephanie Bogan: on behalf of your clients, that does not add value to the business or to the client directly right, so we want to be always looking for and measuring that in this overall.

286

00:42:32.640 --> 00:42:46.800

Stephanie Bogan: sort of story arc of like what's the delivery system behind it, but this is the I think a good frame candace what are your thoughts around how often and how much like where the guard rails on video and using it over using it.

287

00:42:47.070 --> 00:42:53.850

Candice Carlton: yeah I love it if we could go to the next slide I think it just like you to play to to the next thing so.

288

00:42:54.900 --> 00:42:59.130

Candice Carlton: You know I think about the case for digital.

289

00:42:59.640 --> 00:43:10.620

Candice Carlton: and using it across your entire experience and, specifically, this one is demonstrating video, so I think we know very much website and social like that's the place where people have used video.

290

00:43:10.980 --> 00:43:22.230

Candice Carlton: But now repeating more and more using it in one to one email as a touch point to meet the advisors during thing like i'm so excited to see you tomorrow for our meeting.

291



00:43:22.740 --> 00:43:33.540

Candice Carlton: we're going to talk about X, Y and Z from our last follow up the links are down below if you have any questions right, so creating value, creating a touch point before a meeting.

292

00:43:33.840 --> 00:43:40.530

Candice Carlton: Because I really think it's a really valuable opportunity then make that off that meeting, much more valuable because you've.

293

00:43:41.040 --> 00:43:47.790

Candice Carlton: Provided like a pathway and a framework for where you're going post meeting follow ups are really beautiful with that.

294

00:43:48.270 --> 00:43:56.850

Candice Carlton: I really think about using video in a way, and then you've got your one and two that's the one to one in the one too many, for example.

295

00:43:57.150 --> 00:44:03.750

Candice Carlton: You might have started to have a couple of client meetings during a week and you start to hear the same question come up again and again.

296

00:44:04.080 --> 00:44:10.260

Candice Carlton: it's an opportunity to shoot a video and defend it to a group of prospects or clients, or maybe all of them and say you know.

297

00:44:10.530 --> 00:44:15.660

Candice Carlton: This is really to me, this is what I'm hearing across all my client meetings so I wanted to address it, so I think.

298

00:44:15.960 --> 00:44:24.180

Candice Carlton: The beautiful thing about video, is it really gives you an opportunity to humanize your communications through really like super charged them.

299

00:44:24.810 --> 00:44:30.210

Candice Carlton: And I think, also to your point of an experience has a little bit of delight right.

300

00:44:30.450 --> 00:44:41.370

Candice Carlton: And so I always coach you the video is really part of your everyday workflows to keep the garrison keep the scripting simple keep all that really simple so that it takes you 10 minutes to scratch.

301

00:44:41.670 --> 00:44:58.410

Candice Carlton: shoot edit and send a video so that you're scaling your communications you're humanizing it but you're also adding the delight, because the experience of the person receiving that, as my gosh they like made a video for me right, so it just feels much more thing.



302

00:44:58.890 --> 00:45:08.310

Candice Carlton: So, in terms of touch points but typically when we're looking at it from a digital perspective and video so i'll talk specifically about videos capacity.

303

00:45:08.730 --> 00:45:13.470

Candice Carlton: I mean, I feel like i'm echoing what stephanie and Julie, say, but I always say to advisors.

304

00:45:14.190 --> 00:45:22.500

Candice Carlton: You know when advice come out of our workshops or our coaching programs, the tendency is one of two things and sometimes we'll take entire firm so it's like lots of advisors.

305

00:45:22.770 --> 00:45:29.460

Candice Carlton: Sometimes it's a solo practitioner, and the tendency will be one of the 212 over some start making videos for everything.

306

00:45:30.360 --> 00:45:37.530

Candice Carlton: Or the end to really overkill it or the second is to just kind of phrase and stuff and like not do anything right.

307

00:45:37.740 --> 00:45:46.860

Candice Carlton: So my recommendation is always the 8020 rule so like figure out that one spot where you could start using video for highest impact.

308

00:45:47.220 --> 00:45:54.750

Candice Carlton: And you're going to attach you're going to iterate you're going to ask your clients with that video helpful, do you know saying.

309

00:45:55.230 --> 00:45:59.460

Candice Carlton: And you're also going to have them take some type of action you'll have a call to action.

310

00:45:59.790 --> 00:46:08.760

Candice Carlton: Was it helpful What was it meaningful and starting to make videos like where would it be really meaningful for you, if I started spending my time there.

311

00:46:09.090 --> 00:46:15.450

Candice Carlton: And really I think starting to understand where it drives the most value so choosing one spot, so you might say.

312

00:46:15.930 --> 00:46:22.410

Candice Carlton: You know i'm meeting these aspects i'm doing with stephanie staying and very focused on my why



the change that I want to create.

313

00:46:22.680 --> 00:46:27.330

Candice Carlton: I feel like I know my coo and i've got them down the by the time they come to the meetings with me like.

314

00:46:27.570 --> 00:46:39.030

Candice Carlton: i'm feeling like there's just to higher percentage, whether or not a match for me right, so there might be an opportunity on that front and to create more touch points that really get to the depths of who you are and to help them.

315

00:46:39.210 --> 00:46:47.460

Candice Carlton: Self select and decide if there's a match, so I don't believe in any hard and fast rules here because I think everyone's business is so different.

316

00:46:47.790 --> 00:46:57.900

Candice Carlton: But it's really about, I think, when I think about client and prospect communications, as well as marketing in general, like have you be a good marketer how you'd be a good communicator.

317

00:46:58.350 --> 00:47:06.120

Candice Carlton: You just know your client really, really well so asking them getting that feedback and then testing and being open to iterating.

318

00:47:07.770 --> 00:47:15.540

Stephanie Bogan: Well, what I really like is you know it's really about understanding that while awareness of video is high right.

319

00:47:16.230 --> 00:47:23.820

Stephanie Bogan: Thanks to Kobe we are all on board, whether you're older or younger, it does not matter it's really sort of trend imposed if you will.

320

00:47:24.210 --> 00:47:33.840

Stephanie Bogan: Is adoption in the way that candace is talking about and even adoption of engagement, the way that Julie is talking about that's not common.

321

00:47:34.530 --> 00:47:48.060

Stephanie Bogan: Right so where we talk about it and you're like oh i'm not special and how can I charge X and I, you know and i'm like wow you guys like we see the broad spectrum of advisors out there and we know sort of the crossroads that you sit at.

322

00:47:48.480 --> 00:48:03.210

Stephanie Bogan: So there's a lot of opportunities to deliver value, because now people's to candace point your job is to alienate a lot of people on the prospect side but it's to really create that connection once they become.



323

00:48:03.480 --> 00:48:12.060

Stephanie Bogan: A prospect and, ultimately, a client and connection is all about proximity and engagement and in the past, we had meetings.

324

00:48:12.780 --> 00:48:21.780

Stephanie Bogan: phone calls and emails and phone calls was the next best thing right we build those into the service model of course right it's the live interaction, if you will.

325

00:48:22.140 --> 00:48:34.500

Stephanie Bogan: But we have historically leaned really hard on meetings, because everything outside of the meetings, if you flash back 10 years ago can just like what we were doing united was revolutionary and it's still I.

326

00:48:35.100 --> 00:48:38.070

Stephanie Bogan: mean it's still think it's the kind of the leading edge out there.

327

00:48:38.490 --> 00:48:49.860

Stephanie Bogan: is like it was about we reimagined the client meeting itself and we reimagined everything around the client meeting and that's again we're going to set you up to right.

328

00:48:50.100 --> 00:48:57.030

Stephanie Bogan: start that process in May, but this is the conversation that I really wanted to bring you going into that to really start to you know.

329

00:48:57.600 --> 00:49:03.030

Stephanie Bogan: till the soil, if you will start to really give you some fertile fertile ground to think about.

330

00:49:03.360 --> 00:49:13.980

Stephanie Bogan: What value really is in your practice and how you're engaging and how you're delivering so that we can go in reimagine the client meeting and then reimagine the experience around it, and then you can build.

331

00:49:14.340 --> 00:49:21.090

Stephanie Bogan: A very structured and systematized service model that you can scale like I like to call it scaling special candace you remember that from united.

332

00:49:21.210 --> 00:49:29.010

Stephanie Bogan: yeah um alright, so I think we've got some questions, and I know you the two of you have some great answers for a lot of these so i'm going to dig in.

333

00:49:29.340 --> 00:49:37.170

Stephanie Bogan: I see some in the chat so i'm going to grab a couple of those quickly and then we'll go over to slide



Oh, just so I can keep it easy and organized.

334

00:49:38.640 --> 00:49:45.930

Stephanie Bogan: This is sort of related candice and then Julie, I would love to get your perspective on this with clients from an engagement perspective.

335

00:49:46.530 --> 00:49:52.440

Stephanie Bogan: But Aaron wanted to know what social media, do you consider a new school at this point is Facebook out.

336

00:49:52.830 --> 00:50:04.470

Stephanie Bogan: And then candace i'd love to get our i'm sorry Julie i'd love to get your thoughts on you know engaging with clients on social media does that count is the touch point, how do you start doing it so candace let's start with you.

337

00:50:05.250 --> 00:50:14.430

Candice Carlton: I think, new school is really about authenticity right so it's a framework there's no like black and white answer, and so the framework is.

338

00:50:15.090 --> 00:50:26.640

Candice Carlton: What is the change that you're trying to create with that touch point so what is their mind state before that takes point and what is it off after like Why are you doing right like there's a lot of people who just make content.

339

00:50:26.820 --> 00:50:33.240

Candice Carlton: Because they've been told that that's what they need to what does the change that we want to create and then specifically Who was it for.

340

00:50:33.810 --> 00:50:42.270

Candice Carlton: So if you're who is on Facebook that's where you got to be right if you're who like I talk a lot about video but.

341

00:50:43.020 --> 00:50:48.060

Candice Carlton: i'm a marketing coach podcasting we do all the things so but video is just a really easy good example right now.

342

00:50:48.330 --> 00:50:57.120

Candice Carlton: But if you're who never watched a video like and you're clear on that, and you know that absolutely shortly we're not going to make videos right it's just really getting clear on.

343

00:50:57.390 --> 00:51:02.970

Candice Carlton: Where your who is there's lots of like cool things could be like we should be on tick tock we should blah blah blah.



344

00:51:03.330 --> 00:51:15.480

Candice Carlton: But if you're who isn't there it doesn't really matter so it's about what is the change that you want to create that touch point and then who's it, for, and then you can base all your other decisions based on that.

345

00:51:16.920 --> 00:51:27.600

Stephanie Bogan: Well it's interesting because the service model worksheets that we built that Allison and I were going back and refreshing them for May and there's literally one where you've got the touch points and there's like a row for thinking feeling.

346

00:51:27.930 --> 00:51:39.840

Stephanie Bogan: and responding like literally, what do you want them to think at this point what do you want them to feel at this touch point and what is the response you want to write do act solve etc return, you know return like stamp, etc.

347

00:51:40.860 --> 00:51:52.350

Stephanie Bogan: So you know the one I want to echo that into a really is built into kind of the process that we're going to take you guys through, but I want you to understand that that's those are the invisible layers.

348

00:51:52.680 --> 00:52:00.750

Stephanie Bogan: that are going to make sure that you don't have to do 100 touch points you just have to do the right amount right, this is a place where more isn't better.

349

00:52:01.110 --> 00:52:13.680

Stephanie Bogan: Better is better because you're thinking through a much fuller process your mindset, the clients mindset, the experience and the relationship versus just here's a bunch of stuff I'm going to do.

350

00:52:14.010 --> 00:52:19.470

Stephanie Bogan: throw it all out there and hope in the aggregate I get those satisfied clients that Julie talks about so.

351

00:52:20.340 --> 00:52:27.840

Stephanie Bogan: I don't know how many of you were watching, I think, quite a few of you at this point are watching the weekly coaching videos if you haven't yet two weeks ago.

352

00:52:28.200 --> 00:52:34.140

Stephanie Bogan: I talked about how you think your practice is a box and I think it's a race car built on a grid and I'm.

353

00:52:34.560 --> 00:52:39.120

Stephanie Bogan: If you heard that, then you know what I'm talking about, and if you didn't you should go back and watch the video.



354

00:52:39.390 --> 00:52:48.060

Stephanie Bogan: But it's about understanding that it's not just the whole process that you're pushing forward it's each incremental piece taking it out, looking at it.

355

00:52:48.540 --> 00:52:57.630

Stephanie Bogan: Having that fuller process of really evaluating how it fits to candace is point that task you're trying to accomplish and what you want them to think feel and do, but then.

356

00:52:57.960 --> 00:53:07.050

Stephanie Bogan: How it fits that broader set of the overall experience how are you fulfilling on the brand promise, for example, I can't tell you how many times i've seen this I know Julie.

357

00:53:07.500 --> 00:53:15.900

Stephanie Bogan: And candace will echo it I as your financial advisor my job is to simplify your financial life could we please start with a 17 page questionnaire.

358

00:53:17.790 --> 00:53:27.090

Stephanie Bogan: Right, no one wants to start a relationship with you, with like it's hard enough to get gather themselves and a couple of statements to have a sit down with you to finally do it.

359

00:53:27.330 --> 00:53:32.580

Stephanie Bogan: They don't want to fill out a 17 page questionnaire first now, it does not mean that you can't and it won't work.

360

00:53:33.000 --> 00:53:42.330

Stephanie Bogan: But that's about the alignment with the brand promise is a bigger perspective isn't just what you need but Julie talked about the voice of the client like the clients voices.

361

00:53:42.720 --> 00:53:52.740

Stephanie Bogan: Show me that I can trust you to simplify my and organize my financial life in this first interaction is going to help me figure out if you can do that or not, and if you can do that little thing.

362

00:53:53.190 --> 00:54:05.580

Stephanie Bogan: My trust equity news going to go up to 100% and then the next interaction I have with you right it's a little bit safer i'm a little bit more open so that's where i'll how this all comes together with that with the systems.

363

00:54:07.590 --> 00:54:12.060

Stephanie Bogan: Okay let's see we have some more questions let's see video content.

364

00:54:13.200 --> 00:54:17.280

Stephanie Bogan: Is there don had a question around video content donnie you want to jump on and ask it.



365

00:54:19.980 --> 00:54:20.760

Don Hilario, CFP?: yeah no problem.

366

00:54:22.650 --> 00:54:32.760

Don Hilario, CFP?: So when I make videos I think I read the more general you want to keep it concise no more than one to two minutes, but then for like specific client inquiries.

367

00:54:33.270 --> 00:54:42.060

Don Hilario, CFP?: Longer but wasn't sure if there's a best practice metric when you do these videos you want to keep less is more not going to pack up not.

368

00:54:42.570 --> 00:54:57.060

Don Hilario, CFP?: Too much information and send content, or is there, you know if you want to make it user friendly and say hey here's here's a general video boom 60 seconds done then, if you want details, you know that could be the call to action like security meeting or something like that.

369

00:54:58.350 --> 00:55:10.020

Candice Carlton: I done thanks for the question, so I think that if you Google it there's a lot of people that are experts in video and social media and they've got a lot of hard and fast rules around how long your video should be.

370

00:55:10.470 --> 00:55:19.320

Candice Carlton: I don't believe that I think there it's you've got you've got to really look at it from the within this context, and again i'm going to be a broken record in this, but really.

371

00:55:19.830 --> 00:55:25.290

Candice Carlton: I think the idea is to be full and just learning right, not just to like it's kind of like.

372

00:55:25.590 --> 00:55:30.240

Candice Carlton: If you go to a personal trainer like old personal trainers kind of do the same thing, like ultimately.

373

00:55:30.480 --> 00:55:37.950

Candice Carlton: Right so then it's a question of like well how do you choose which personal trainer you're going to work with typically the one that you think you're going to vibe with quite.

374

00:55:38.340 --> 00:55:44.790

Candice Carlton: Frankly i'm going to enjoy working out with this person, and so I think about financial advisors within that same context, right that's why.

375

00:55:45.030 --> 00:55:50.040



Candice Carlton: showing up authentically is so important because, if you're not showing up authentically then you're confident content.

376

00:55:50.760 --> 00:55:59.640

Candice Carlton: So when it comes to the length of the video this is how I recommend that advisors approach it, and that is one How long does the topic that you.

377

00:55:59.940 --> 00:56:12.240

Candice Carlton: That you're going to cover actually require like let's just be honest about that does it require 90 seconds, does it require 45 minutes on a webinar because that's a video too so like just being clear on that so like asking that question.

378

00:56:12.690 --> 00:56:17.520

Candice Carlton: The second question is how long is your who actually going to watch it for.

379

00:56:17.790 --> 00:56:28.680

Candice Carlton: So, for example, if i'm sending a video to an executive at one of the companies of bullets out the three things that are in the video and the video is super short, because I know that they're not going to really watch it right.

380

00:56:29.070 --> 00:56:37.080

Candice Carlton: When you're thinking about there's two points that you made that I thought were really good too if you're posting it externally so it's going to be on social media, there will be platform limits.

381

00:56:37.170 --> 00:56:43.710

Candice Carlton: So that's just something that you have to take into account right Twitter is two minutes and 20 seconds, so if you're sending something they're just being.

382

00:56:44.070 --> 00:56:50.910

Candice Carlton: Key to that, but then the third point is your video is always going to be contextualize and I think that's what you're talking about right.

383

00:56:51.090 --> 00:57:01.590

Candice Carlton: So your videos on your website or your videos in an email, so you don't have to cover everything in the video because you can have links, you can have attachment.

384

00:57:01.980 --> 00:57:04.830

Candice Carlton: And so there was a CIO that I was working with, and he said.

385

00:57:05.460 --> 00:57:12.570

Candice Carlton: He spent them three days him his team would work on these PowerPoint decks for older advisors to then be able to talk to their clients.



386

00:57:12.810 --> 00:57:22.380

Candice Carlton: We worked on our approach for video where he in his video he would talk about High Level three executive like talking point for the advisors could use with their clients.

387

00:57:22.770 --> 00:57:34.650

Candice Carlton: And then he would attach what was like I think like a 20 page that can like White Paper, you would attach like a three slide deck on so using that video as an executive summary.

388

00:57:35.040 --> 00:57:51.270

Candice Carlton: And then, using your attachments or links for anyone that may be interested in more information if you're just starting out and that feels like a little bit confusing I say stick to a Max of two and a half minutes and then just feel that out and see how it goes.

389

00:57:52.080 --> 00:58:01.920

Julie Littlechild: If I could just jump in as well, I think we it's it's we've also got to separate the content from the delivery mechanism and sometimes I find those two things almost get.

390

00:58:02.280 --> 00:58:10.710

Julie Littlechild: Conflict like will my clients want video well, maybe, maybe not right, so I think there's probably three questions, what are you interested in learning more about.

391

00:58:11.130 --> 00:58:20.610

Julie Littlechild: What are you interested in learning about from me right, I might be interested in brain surgery, but I don't want my advisor sharing information on that with me and then, how do you consume content right and.

392

00:58:20.850 --> 00:58:28.560

Julie Littlechild: And just getting those three questions answered I think starts to create and that's the same with social media, I mean we've seen an increase in people saying.

393

00:58:28.950 --> 00:58:40.590

Julie Littlechild: Absolutely on social media, but the wrong question is, do you want to follow me on social media it's what are you using, how do you consume content and then sort of lean into using you know go where they are.

394

00:58:42.180 --> 00:58:56.520

Stephanie Bogan: And I think that's a good segue back to kind of that question that I had asked at the at the onset of this, which is how are you seeing like where do you see social media in the engagement cycle with clients and you know what are some of the things that you're seeing that are working.

395

00:58:57.090 --> 00:59:04.890

Julie Littlechild: Well, I mean we've we've been asking this of clients lately, I mean you mentioned also virtual meetings where I mean at the risk of digressing we're seeing about.

396



00:59:05.400 --> 00:59:20.880

Julie Littlechild: Often, half of clients saying i'm either ambivalent about face to face or i'd actually prefer not to be face to face, I mean we've seen this extraordinary shift over the last little we've seen a slower increase in people saying i'd like to to.

397

00:59:21.900 --> 00:59:27.900

Julie Littlechild: connect with my advisor on social media, but I also realized we've been asking the wrong question sometimes we're wrong.

398

00:59:28.890 --> 00:59:38.760

Julie Littlechild: that's not the question it's just what are you using and in Am I using it is that an appropriate delivery mechanism so we're definitely seeing increases in that.

399

00:59:39.120 --> 00:59:45.150

Julie Littlechild: And i'm seeing a lot of advisors who are just saying you know that's not for me and that always makes me nervous.

400

00:59:46.050 --> 00:59:51.060

Julie Littlechild: I mean, I think we've got to be honest, if it's not for you it's not for you, just like candace mentioned with.

401

00:59:51.930 --> 01:00:01.470

Julie Littlechild: With video but we can't pretend it's not happening, and you know I think I think we've really got to start getting comfortable but successfully right now.

402

01:00:02.130 --> 01:00:18.810

Julie Littlechild: it's all the same stuff right people who have a clear, a clear niche they're curating great content that's relevant for their niche and they're setting themselves up as an expert on you typically we're just seeing what sort of linkedin and Twitter and but primarily linkedin.

403

01:00:20.220 --> 01:00:29.430

Stephanie Bogan: Well, and I think again you've been I think that's a really important point, and I think that, again, the thing we want you to do here is not just like we asked, we want to give you the model.

404

01:00:29.790 --> 01:00:38.340

Stephanie Bogan: We want you to be able to go follow the bottle but what we're really talking about when you when you're in that space of turning the invisible divisible is it's much more i'll call it a thought set.

405

01:00:38.850 --> 01:00:46.620

Stephanie Bogan: Which is what sort of the frame for the thinking because there isn't exactly a checklist for some of this stuff right, you can say every video should be.

406

01:00:46.920 --> 01:00:55.860



Stephanie Bogan: exactly this long but it's going to depend on the contact right so in our weekly coaching videos some of them are two minutes and 20 seconds, and I think one of them was five minutes.

407

01:00:56.400 --> 01:01:02.580

Stephanie Bogan: But I was making a coaching like so it's the context of that video that makes it appropriate right so then.

408

01:01:02.940 --> 01:01:13.710

Stephanie Bogan: What we haven't talked about and we'll talk more about it is on the back end you ultimately want the analytics right, you can see who's opening the videos and watching them and who's not and then you can start to realize hey these clients never.

409

01:01:14.130 --> 01:01:23.400

Stephanie Bogan: Open my videos they're not going to consume in that way right, so they like to eat breakfast in them, you know before noon other people like to eat it after that, like that's just.

410

01:01:23.760 --> 01:01:30.450

Stephanie Bogan: What you ultimately want to start to do is put some data and analysis behind it, to start to understand client preferences.

411

01:01:30.780 --> 01:01:42.330

Stephanie Bogan: Because you might love video and 60% of your clients might absolutely dig it, but if there's 40% that don't you can think that you're hitting it out of the park and 45%.

412

01:01:42.780 --> 01:01:47.970

Stephanie Bogan: are just you know, seeing your face, which is still nice from brandon impression standpoint, but not the same.

413

01:01:48.420 --> 01:01:52.980

Stephanie Bogan: As like actually watching the video or getting the engagements you've got things like transcripts.

414

01:01:53.760 --> 01:01:59.670

Stephanie Bogan: So, again there's so much more conversation I mean we could spend a year talking about engagement and value all by itself.

415

01:02:00.030 --> 01:02:07.290

Stephanie Bogan: I see a great question in the chat and then i'll head over to slide Oh, but I think this is a good one for us to just this is sort of the jam session part.

416

01:02:07.740 --> 01:02:18.630

Stephanie Bogan: I think it was Dan and Neil are talking about there's a guy on YouTube I don't know if you know him calling first on YouTube so he'll post it I don't know who he is but maybe Dan can share it.



417

01:02:19.980 --> 01:02:24.600

Stephanie Bogan: Dan you want to drop, can you drop on and you want to tell them walk us through it and maybe we can brainstorm that one.

418

01:02:25.800 --> 01:02:28.410

Dan Suiter: draw upon jump in however you want me to show up.

419

01:02:29.370 --> 01:02:36.690

Dan Suiter: Now he's a project guy mean my I have four boys, so we watched all sorts of crazy super hyper so it may not be everyone's flavor but.

420

01:02:36.930 --> 01:02:42.030

Dan Suiter: A lot of times i've seen this with some other youtubers he'll put up like a two three minute video That summarizes this project.

421

01:02:42.270 --> 01:02:49.710

Dan Suiter: And just shows the outcome and that's it and then he has got a deeper dive that shows how he built the project that's usually like 20 minutes or something like that.

422

01:02:50.010 --> 01:02:56.220

Dan Suiter: And so it's just interesting looking at the click rates and stuff like that from just observing I wonder if that's something we can do in our side, like.

423

01:02:56.670 --> 01:03:04.290

Dan Suiter: Whether it be in print or and video or even podcasts or whatever you send a summary with a click through for the long view.

424

01:03:04.620 --> 01:03:13.950

Dan Suiter: And then you could track through like who's finding value in the long form who's finding value in the short, when you can kind of get that data from your own you know niche group, or so I just i'm thinking out loud here.

425

01:03:14.970 --> 01:03:21.870

Julie Littlechild: And I think it's also you know, like if he if he can apply that to kind of the the journey as well, like there's.

426

01:03:22.830 --> 01:03:32.760

Julie Littlechild: short term versus long form or they really keen just before review did they really love it after review do they ino, so I think the interesting to kind of dig into.

427

01:03:33.630 --> 01:03:40.530

Julie Littlechild: When when is it meaningful like is it is it a part of a particular part of that relationship will be interesting to see as well.



428

01:03:42.960 --> 01:03:53.850

Stephanie Bogan: Well it's an interesting correlation Dan to the idea of the one page plan relative to write the deeper plans, which is, I call it the dashboard concept it's very much what we did at united.

429

01:03:54.150 --> 01:04:02.580

Stephanie Bogan: it's very much what we try and do with all of you, which is, I think, at any given time when someone's looking at something I assume that one they have the attention span of a gnat.

430

01:04:03.210 --> 01:04:10.800

Stephanie Bogan: Not just you I just assume that for everyone, because people are busy, and the thing we are doing first foremost and always.

431

01:04:11.280 --> 01:04:23.910

Stephanie Bogan: When we engage with people is competing for their attention so to julie's point it's got to smack with value 100 mediocre touch points are I know it's to me as a client.

432

01:04:24.300 --> 01:04:31.350

Stephanie Bogan: Where six really amazing ones that feel really genuine to our relationship, however we've carved that out, which is why.

433

01:04:31.560 --> 01:04:38.610

Stephanie Bogan: Having that clear finding your voice and your client and you're swimming confidently is so incredibly valuable because you waste no energy.

434

01:04:38.910 --> 01:04:45.540

Stephanie Bogan: Trying to be do or create this that or the other, for people that is really not in your swim lane, and when you get there.

435

01:04:46.020 --> 01:04:54.810

Stephanie Bogan: that's when you're going to start to see as Julie talks about right from satisfied to engaged I call it being the trusted advisor right that go to person.

436

01:04:55.110 --> 01:05:03.570

Stephanie Bogan: That the client does not expect you to deliver the plan right you're not the defender of it your job is to be the guide of it.

437

01:05:03.960 --> 01:05:08.340

Stephanie Bogan: And to help you endured right to get through the process, not some event.

438

01:05:08.760 --> 01:05:13.830



Stephanie Bogan: And that's all that's what engagement is, as we talk about these things, so I love the idea.

439

01:05:14.070 --> 01:05:23.460

Stephanie Bogan: Candace I'd love to get your perspective from a video perspective of places you could use an idea like that, but that's what I see like I see that, and you had mentioned earlier Candace.

440

01:05:23.910 --> 01:05:30.210

Stephanie Bogan: When you're doing a you know sort of we'll call it content leadership or thought leadership, but we've got a video or a value add.

441

01:05:30.450 --> 01:05:36.870

Stephanie Bogan: Where you've got the video, and then the links to other resources it's the same thing right is the equivalent of the financial plan stack.

442

01:05:37.260 --> 01:05:45.570

Stephanie Bogan: There for the engineering client that actually wants to read right line 73 and the cash flow analysis and ask you why that happens that year 72.

443

01:05:46.470 --> 01:05:55.290

Stephanie Bogan: You know most clients just want to see the front page so there's ways I think to stack it I'd love kindness would love to get some perspective for you and Julie if you've got any ideas jump in like.

444

01:05:55.740 --> 01:06:01.350

Stephanie Bogan: Where would be some places that we could do that to like take deep content that we maybe already have.

445

01:06:01.710 --> 01:06:13.110

Stephanie Bogan: Write articles we've written powerpoints we've done like that's where my brain goes like, how do we repurpose stuff we've already got and then we dug out marketing, but what what are your any thoughts on that.

446

01:06:14.520 --> 01:06:24.930

Candice Carlton: First of all, I love that you're going to call returns on we had him on our new school podcast talking about this exact thing he's on episode three you can look up the new school school okay.

447

01:06:25.620 --> 01:06:36.750

Candice Carlton: And he talked about this idea of obviously being the guide and not the defender of outdated math and I think we have visuals that we're always using around that.

448

01:06:37.320 --> 01:06:43.080

Candice Carlton: And so I think definitely what you're asking is how do you use video for highest impact, how you.

449



01:06:43.890 --> 01:06:51.570

Candice Carlton: it's how I think I hear two questions in it it's like ready to use video for highest impact, and then the second question, potentially like.

450

01:06:51.960 --> 01:07:03.930

Candice Carlton: How do you create content and like um and then use it across your experience in a meaningful way without having to essentially be a content machine is that what you're asking yeah.

451

01:07:04.020 --> 01:07:15.990

Stephanie Bogan: Okay, good yeah I like it really is an open air, because i'm just thinking through what they're saying, which is really you've got your summary content and then you've got your deeper content, so my brain starts thinking wait we've already got content, could we.

452

01:07:16.290 --> 01:07:20.670

Stephanie Bogan: Could we record a video right on top of this subject we've got content around.

453

01:07:20.970 --> 01:07:31.650

Stephanie Bogan: And then basically get all the credit for all that content, and you know all the credibility goes with it, but we're just recording and 92nd video to be like hey right now, this is a hot topic people have lots of questions about.

454

01:07:32.070 --> 01:07:38.370

Stephanie Bogan: Changes in the tax law X, Y or Z here's some attached literature right, it might have taken you 20 minutes to find it on Google.

455

01:07:38.730 --> 01:07:47.340

Stephanie Bogan: And like are you seeing people do because that's where my head goes around like one repurposing and then any ideas around new stuff but have you seen anyone doing things like that.

456

01:07:47.940 --> 01:07:59.970

Candice Carlton: yeah So if you look at it from a content perspective and i'll use our podcasts as an example, because this is what we're doing more and more with advisors right, so you know podcasting is very new in this formation.

457

01:08:00.480 --> 01:08:08.340

Candice Carlton: Even though it seems like there's a lot if you compare it to blogging like the numbers are just like huge I also think that there's a huge opportunity for advisors typically.

458

01:08:08.700 --> 01:08:13.500

Candice Carlton: To be creating podcast content that is client specific because most of the advisor podcast.

459

01:08:14.460 --> 01:08:17.580

Candice Carlton: If you really listen to them are tailored other advisors.



460

01:08:17.940 --> 01:08:27.060

Candice Carlton: So, and the reason I bring that up, although we've been addressing video is the way we use our podcast and the way we're using it, even with our clients when i'm coaching them around it is.

461

01:08:27.450 --> 01:08:37.500

Candice Carlton: They record an episode on a topic that might be really of high importance to your clients right like that might be really meaningful and we're putting both video and audio.

462

01:08:37.950 --> 01:08:47.160

Candice Carlton: What that then gives us the ability to do is have a audio full length audio and i'll say to clients or advisors really I know you're.

463

01:08:47.550 --> 01:08:59.220

Candice Carlton: afraid of showing up authentically or telling or being vulnerable in your marketing group communications, you should listen to Paul richards episode that we recorded with him because he talks all about it, how he lost his house.

464

01:08:59.490 --> 01:09:09.090

Candice Carlton: He wrote about it in the New York Times, and then the shame that you felt about that, and how before you can always clients so we've got a full length audio we also have a full length video.

465

01:09:09.600 --> 01:09:19.440

Candice Carlton: We then have created a short snippets of the videos we have like six to eight short video clips of we have a client question that comes in, we can send them those specifically.

466

01:09:19.800 --> 01:09:30.780

Candice Carlton: And we can share it across social media, we then create quote graphics from that so we'll have like you are a guide, not a defender of an updated map with Carl richards right and his thing in that.

467

01:09:31.080 --> 01:09:46.200

Candice Carlton: So then, you have quote graphics and that we can then take it a we had converted worksheet so we can build Q and a's there's all types of content, so if you've got like a master content, so if you say this quarter what i'm hearing about from my clients is xyz.

468

01:09:46.740 --> 01:09:56.580

Candice Carlton: and get a record this one webinar i'm going to interview this one gets like i'm going to record this podcast episode, whatever it is.

469

01:09:56.940 --> 01:10:04.530

Candice Carlton: Taking that and then chopping it up and all the different ways that you can to share it with clients in a way that's really consumable.



470

01:10:04.740 --> 01:10:10.620

Candice Carlton: For that, and so we know no one, no one as much as good as we think we are it's like famous call Richard says.

471

01:10:10.950 --> 01:10:15.510

Candice Carlton: No one's going to listen to our watch our 45 minute video with call virtual they're just not going to.

472

01:10:15.840 --> 01:10:27.720

Candice Carlton: But they will potentially listen to it, while they're working out and they might watch the short clips which might drive them to the full length, which is what we're talking about with the executive summary so when you're thinking about playing content.

473

01:10:28.020 --> 01:10:32.460

Candice Carlton: If that's where so I see like using digital across your client touch point.

474

01:10:32.970 --> 01:10:39.750

Candice Carlton: As like as your account servicing as your onboarding is Julia was talking about as you're prospecting and might even be like.

475

01:10:40.110 --> 01:10:46.800

Candice Carlton: here's how to like see access your online portal and it's like a video like a how to or scaling some of those things.

476

01:10:47.100 --> 01:10:51.930

Candice Carlton: that's kind of the one level when you're thinking about engagement and driving value.

477

01:10:52.200 --> 01:11:01.980

Candice Carlton: that's really where we are with this guy kind of like second approach to content, which is like, how do you create really meaningful valuable content that's one and done.

478

01:11:02.220 --> 01:11:18.030

Candice Carlton: That doesn't require a ton of your time that you can then chop up or use in multiple ways to help not only with those current clients, but even prospects, because I see advisors doing this now, they can say Oh, the prospect are asked about.

479

01:11:18.570 --> 01:11:32.070

Candice Carlton: Something and they can be less cool we actually have a video on that we actually have a podcast episode on that we actually have something and so you've got that content that you can then share with them at that point that didn't take you that much time to originally create.

480

01:11:33.630 --> 01:11:40.350

Julie Littlechild: I mean just to add to that a couple of quick ideas we you know, one of the trends and I don't know if



you're all seeing this as well.

481

01:11:40.650 --> 01:11:50.820

Julie Littlechild: Around communications generally is this idea of creating Community you know, to the extent that you can use communications and use your experience to make clients feel part of something.

482

01:11:51.120 --> 01:11:58.710

Julie Littlechild: Like you're all part of a Community or you get something out of that and and so two quick ideas we've seen all along those.

483

01:12:00.270 --> 01:12:02.790

Julie Littlechild: Along those lines that make it easier is one.

484

01:12:03.510 --> 01:12:11.670

Julie Littlechild: You know if you're writing a blog if you're doing something that takes time just recording say say a video or something that's the 90 seconds kind of behind the scenes.

485

01:12:12.030 --> 01:12:22.200

Julie Littlechild: you're part of my Community so i'm actually going to give you just a little tidbit more i'm going to tell you why we wrote about this so i'm going to say you know just something to reinforce community and add value.

486

01:12:22.680 --> 01:12:33.540

Julie Littlechild: And the other thing that we saw with a number of advisors, particularly over the last year, is using the Community to create content, so we we.

487

01:12:34.200 --> 01:12:42.990

Julie Littlechild: Talk often about this idea of this hidden gems pool, which is just sending out a pool to your clients so in the last year, for example, we had a bunch of advisors who did one on.

488

01:12:43.470 --> 01:12:52.950

Julie Littlechild: You know what's The one thing that you've done now, this is going back quite a few months to to really support your Community or to support your family during this time.

489

01:12:53.520 --> 01:13:04.770

Julie Littlechild: And they asked their clients to share their one best idea, and then they created a resource and shared it out with everyone well you didn't have to create any of that content and it reinforced the idea of community, so I think you can.

490

01:13:05.490 --> 01:13:09.720

Julie Littlechild: Use your community to shortcut this in a in a really meaningful way.

491



01:13:11.250 --> 01:13:19.890

Stephanie Bogan: Well, one of the ideas Carla and I were talking about this so it's kind of a serendipitous timing, but we were talking about and sort of as coven hopefully begins to wrap.

492

01:13:20.490 --> 01:13:28.410

Stephanie Bogan: We talked about it at the beginning, but we haven't done it, but we were talking about sending out creating a very quick you call it a hidden gems right just a very simple survey to.

493

01:13:28.410 --> 01:13:39.030

Stephanie Bogan: clients or doing it as part of client reviews, asking them like what kind of what they had most taken away from code in terms of what they had learned and what what they had changed.

494

01:13:39.480 --> 01:13:48.000

Stephanie Bogan: And what they would want to reflect on later right like and then the idea is we were going to write all of that up put it into a cool piece.

495

01:13:48.360 --> 01:13:59.040

Stephanie Bogan: compile it all share it and then, as part of the business end of that you know from an engagement perspective is then in future client reviews guess what you now have yeah.

496

01:13:59.490 --> 01:14:06.870

Stephanie Bogan: Now you have when we talk about really goals based reviews and advice being about the outcomes for them and the experience it's hey.

497

01:14:07.170 --> 01:14:12.510

Stephanie Bogan: Remember, we just thought this would be the coolest thing like oh wouldn't it be great to sit down from the client a year from now, and be like hey.

498

01:14:12.720 --> 01:14:23.160

Stephanie Bogan: You know kind of the tail into coven, this is what you had told us, you have learned and what you know what a relationship with money was about her more time with to get whatever you know it's been a year, you know.

499

01:14:23.700 --> 01:14:29.940

Stephanie Bogan: let's check in on that right is the work that we're doing here empowering you to do more of that like that's a powerful conversation.

500

01:14:30.300 --> 01:14:35.760

Stephanie Bogan: Right or client calls back in five years, when the markets down and you're like hey remember that the goal here is.

501

01:14:36.060 --> 01:14:42.420

Stephanie Bogan: This thing that you told me that mattered most, and that means not taking the extra like whatever



the conversation behind it is so.

502

01:14:42.720 --> 01:14:57.750

Stephanie Bogan: If you all are interested in something like that, let us know, because we were thinking that could be a really fun sort of in client engagement piece use it for marketing and then ultimately use it back with clients over the years as river a grounding rod to what matters most for them.

503

01:14:58.350 --> 01:15:03.420

Julie Littlechild: it's a good referral driver to like get shared those kinds of things you know yep yeah.

504

01:15:03.450 --> 01:15:07.260

Stephanie Bogan: So that but it's a point like that's what she means by co creating content.

505

01:15:07.770 --> 01:15:16.230

Stephanie Bogan: is right there's things that you have or things that you're doing with your centers of influence, or you know compiling articles and then putting a cover on them.

506

01:15:16.500 --> 01:15:29.790

Stephanie Bogan: recording a 32nd video to go with it like that, so that becomes a credibility piece because remember you're a curator right so there's content leadership and then there's curation and.

507

01:15:30.330 --> 01:15:40.140

Stephanie Bogan: A huge part of leadership is curation and then your opinion on what you're curating so you can curate content on any topic share your opinion on it.

508

01:15:40.500 --> 01:15:48.930

Stephanie Bogan: And then essentially get the credibility of right having written the article or done without all the extra left but it's not the only credibility, you want to do.

509

01:15:49.230 --> 01:16:02.850

Stephanie Bogan: But there's ways to layer lighter and deeper in a way that you know if your goal is to be a thought leader like, how do you want to do that reinforce that with clients and centers of influence in a way that makes sense, where these video where these other touch points.

510

01:16:03.270 --> 01:16:09.750

Julie Littlechild: You just used a word which was leadership that I thought was really important to underscore because we saw statistically.

511

01:16:10.290 --> 01:16:23.820

Julie Littlechild: A connection between clients who are engaged and clients who described their advisor as a leader, and I think that all of what we're talking about here the right content on the right issues delivered in the right manner is a form of leadership yeah.



512

01:16:25.680 --> 01:16:36.420

Stephanie Bogan: They have quite I think to your point we can ask them surveys, we can ask them questions and then part of it is my job is to survey the landscape and share with you the digested version, the consumable version.

513

01:16:37.110 --> 01:16:47.640

Stephanie Bogan: Of what you need to know, and I think rent engagement touch points and video being one of them is a great way to do that as we head into may again just be thinking about there's the planning touch points.

514

01:16:48.120 --> 01:16:58.770

Stephanie Bogan: right kind of the core planning work there's the woman to call them the specialty touch points we'll talk about this, as we get to the the model meeting and the agenda right things that apply to every client.

515

01:16:59.670 --> 01:17:08.370

Stephanie Bogan: You know, no matter who they are right young, old everybody's going to we're going to do some retirement planning right we're going to what do you want to save all of those things you've got your specialty layer

516

01:17:08.730 --> 01:17:13.680

Stephanie Bogan: Which is, what are the things special to that client or type So if you have a general practice.

517

01:17:14.070 --> 01:17:23.220

Stephanie Bogan: And you haven't quite gotten to that niche focus yet you're going to have buckets within that practice right you're going to have some business owners and retirees you're going to want to tag those.

518

01:17:23.430 --> 01:17:29.700

Stephanie Bogan: so that you can build some specialty touches into both your client meeting process and your engagement process.

519

01:17:30.120 --> 01:17:37.800

Stephanie Bogan: that are related to them in a specialty level, and then the personal level is them right it's Dan it's dawn it's candace it's Julie.

520

01:17:38.130 --> 01:17:47.970

Stephanie Bogan: Those are things you want in every agenda in every email in you know, not every video because again you're trying to scale some of those, but it can be dear john comma here's the video.

521

01:17:48.270 --> 01:17:55.830

Stephanie Bogan: So, think about it, you know as you as we go into that be thinking about it through the lens of there's this very tangible piece.

522

01:17:56.190 --> 01:18:03.360

Stephanie Bogan: there's the very intangible piece, and our job is to walk you through a process that there's a process that helps you.



523

01:18:03.750 --> 01:18:15.030

Stephanie Bogan: Follow the tangible steps and, in doing that film in the in the invisible so that you end up with a process and an experience that really reflect the clients that you serve and the value that you can deliver it like that's the goal.

524

01:18:16.290 --> 01:18:18.660

Stephanie Bogan: I got some oh sorry I.

525

01:18:18.900 --> 01:18:28.290

Candice Carlton: Say there's also something that I think that's really relevant and I loved Melissa for your comment everyone's new school what's The next step, I like I promise you want everyone in the industry is.

526

01:18:30.180 --> 01:18:30.960

Candice Carlton: Very low.

527

01:18:32.070 --> 01:18:38.910

Candice Carlton: But I mean that is such a good time to think that I like i'm looking too big firms that they don't need they don't use webinars like.

528

01:18:39.330 --> 01:18:46.260

Candice Carlton: we're doing 10 years ago, like, I understand, no one's on video and there's like this real hesitancy around it and.

529

01:18:46.890 --> 01:18:53.310

Candice Carlton: But I think that's something that's really key when we're talking about digital first approach like had costume video or things like.

530

01:18:53.580 --> 01:19:07.680

Candice Carlton: Why is that important well one more new virtual world, so I think that's that's the obvious part, but I think there's also great that's being an event that I want to bring to surface, which I think it's really relevant to everything you did a limitless step, which is this idea that.

531

01:19:08.970 --> 01:19:25.110

Candice Carlton: New school is about influencing versus informing it's about demonstrating versus telling and it's about being in conversation with versus broadcasting.

532

01:19:25.800 --> 01:19:35.850

Candice Carlton: So I think like the reason video is so high impact or creating content for your clients so impact and we're not doing White Papers that was like telling is like.

533

01:19:36.090 --> 01:19:45.210



Candice Carlton: Really, demonstrating your ethos, so that whole idea of like what you said, definitely simplify your finances and then the process is really convoluted.

534

01:19:45.600 --> 01:19:58.380

Candice Carlton: Like your content is also like a really beautiful and like high impact way to demonstrate your brand value and proposition and to be living it so, for example.

535

01:19:58.740 --> 01:20:11.160

Candice Carlton: stephanie's 100 hours what is \$100 some extra revenue like and she's in Costa Rica right, so we were clear on what she had I haven't seen any videos of her on the beach in Costa Rica just.

536

01:20:13.860 --> 01:20:14.490

Stephanie Bogan: Wait but.

537

01:20:14.550 --> 01:20:18.090

Stephanie Bogan: My video my last video was actually by the pool yesterday.

538

01:20:19.050 --> 01:20:21.390

Candice Carlton: demonstrating it visual.

539

01:20:22.170 --> 01:20:35.100

Candice Carlton: imagery her videos or content is going to be showing that, because a lot of friends what they do is they say they're one thing and then the way that they show up in their communications and their process.

540

01:20:35.460 --> 01:20:43.830

Candice Carlton: it's all the same thing your communications and your touch points is an extension of the value that you're creating and that's all it is, and it was born yeah.

541

01:20:44.430 --> 01:20:49.140

Stephanie Bogan: yeah literally i'm in my sunglasses and my running hat nothing, nothing special but i'm like i'm.

542

01:20:49.140 --> 01:20:51.150

Stephanie Bogan: Here well but they're.

543

01:20:51.750 --> 01:20:53.430

Candice Carlton: Using your stuff like I know.

544

01:20:53.550 --> 01:20:58.320

Stephanie Bogan: But but that's the point branding from a branding perspective that's the goal like.

545



01:20:58.350 --> 01:21:05.070

Stephanie Bogan: yeah it's about the lifestyle and you see me, I mean i've been locked up for your like everybody else, but at the end of the day, you don't want to see.

546

01:21:05.520 --> 01:21:15.150

Stephanie Bogan: I can't I mean I sometimes I do calls outside not these calls, but right like you want to see that there's actually like delivery on the plan like Oh, she is actually doing these things.

547

01:21:15.150 --> 01:21:16.140

Candice Carlton: Actually doors night.

548

01:21:16.410 --> 01:21:24.540

Stephanie Bogan: yeah right hey when we reach out to the coaches, on Friday, and we asked them what they're doing we get pictures them, not in the office oh okay like this is what we want to demonstrate.

549

01:21:24.930 --> 01:21:29.640

Stephanie Bogan: Because to candace this point into I think julie's made this point in a number of ways is.

550

01:21:30.090 --> 01:21:40.830

Stephanie Bogan: Your job is to be the influencer like there are things that you can influence and there are things that you can control and you can't do both your job is to influence to the greatest degree possible the outcomes of your clients.

551

01:21:41.190 --> 01:21:47.790

Stephanie Bogan: The clearer, you are in the clients, the process and how you're going to engage them, the greater the level of influence that you can exert.

552

01:21:48.270 --> 01:21:53.460

Stephanie Bogan: And so i'm just trying to peel back the curtain of it's not like have a meeting make a phone call send a report.

553

01:21:53.700 --> 01:22:07.800

Stephanie Bogan: It is a process of literally like I am building a partnership with you, where you and I are getting in the car and you're saying I am I, the way I took Carla and I talked about it is you're the guide, not the guarantor.

554

01:22:08.760 --> 01:22:18.120

Stephanie Bogan: Right your job is to be in the car with them the entire way not to guarantee that there will be no bad weather, no rough spots no accidents just that you'll be that trusted person.

555

01:22:18.420 --> 01:22:24.510

Stephanie Bogan: I call it the lifelong Problem Solving partner like people just want to know that when they have the need, they can pick up the phone.



556

01:22:24.870 --> 01:22:32.730

Stephanie Bogan: And a person that cares about them and is capable and competent is actually going to be there to sit in that seat, and if you can do that, they will be.

557

01:22:33.060 --> 01:22:41.520

Stephanie Bogan: utterly engaged cleanse for life and you won't have to worry about a lot like you just keep delivering on the system are going to help you build because all of this is baked into.

558

01:22:42.030 --> 01:22:49.560

Stephanie Bogan: That system, this is really just getting you guys really clear like now that we've talked about communicating value we are shifting into.

559

01:22:50.010 --> 01:22:57.660

Stephanie Bogan: How we're going to deliver on the promises that we're making and there is not a gap between those two processes, there is a bridge.

560

01:22:57.960 --> 01:23:06.330

Stephanie Bogan: Between the promise that you made your brand promise, whatever it is direct or indirect implied or not depending on where you are in the telling of your story.

561

01:23:06.810 --> 01:23:14.100

Stephanie Bogan: But that shift is now to now you've got to show up and walk the walk and I want you to be very intentional.

562

01:23:14.490 --> 01:23:26.640

Stephanie Bogan: about the model that you build so that it is hyper efficient hyper effective and that will mean that you can use all that save time and energy to make it hyper enjoyable for you and the client.

563

01:23:27.540 --> 01:23:38.910

Stephanie Bogan: All right, we've got about six or seven minutes and I know we've got some practical questions inside Oh, I do want to remind you all, we are not going to get to them all and i'm saving, some of them, because both Julie and candace are going to be back.

564

01:23:39.690 --> 01:23:46.800

Stephanie Bogan: at the May retreat with their own air time so Julie, will be doing, one of the opening sessions and then we'll have q&a with her.

565

01:23:47.010 --> 01:23:52.740

Stephanie Bogan: candace will be doing another one of the opening sessions will have Q amp a with her and then each of them will have.

566

01:23:53.070 --> 01:23:59.910



Stephanie Bogan: A strategic partner session where they're just talking through their specific services and offerings will have other strategic partners as well.

567

01:24:00.450 --> 01:24:07.770

Stephanie Bogan: If you can't make them all we're going to record them so you'll have the opportunity to hear them again and do a deep dive around how they do what they do.

568

01:24:08.370 --> 01:24:16.620

Stephanie Bogan: In the event that that fits where you are, as we go through quarter to quarter three right a couple of practical questions and Julie i'm going to ask you to lead on this.

569

01:24:17.880 --> 01:24:23.640

Stephanie Bogan: What do you do it's anonymous so I don't know who to call on, but when What do you do when the client portal.

570

01:24:23.940 --> 01:24:31.050

Stephanie Bogan: is fair, not great it's run by the bd and there's another one, what do you do if the bd won't allow you to use videos right so.

571

01:24:31.320 --> 01:24:45.300

Stephanie Bogan: Not everybody is in a position where they're right able to do anything and everything I want what how have you how have you each scene accommodations be made there, and any suggestions around how to had a band aid around that if you can.

572

01:24:46.290 --> 01:25:01.080

Julie Littlechild: I mean, I think I think the biggest thing is just accepting it because I think part of the problem is, we get so infuriated by the limitations that we spend all our time thinking about how annoying it is that we have these limitations so there's.

573

01:25:01.800 --> 01:25:05.160

Julie Littlechild: If if the if the plot the portal isn't great.

574

01:25:05.910 --> 01:25:19.110

Julie Littlechild: Then I don't think there's any problem just letting clients know what it is they can do, but we can do we can provide other communications, we can provide guidance we can help them use it as effectively as they can reality is they're not comparing one to the other.

575

01:25:20.220 --> 01:25:26.550

Julie Littlechild: So look there's there's always limitations and i'm sure there's some on video I know there's some on social media.

576

01:25:27.480 --> 01:25:41.100

Julie Littlechild: there's 100 different ways to approach this right and that's where I think sort of a journey mapping



exercise starts to become a really valuable one where it's like what are we trying to accomplish and then how can we accomplish it so.

577

01:25:42.030 --> 01:25:42.300

Julie Littlechild: You know.

578

01:25:45.060 --> 01:25:45.690

Stephanie Bogan: i'm answering.

579

01:25:48.660 --> 01:25:52.740

Stephanie Bogan: answering the chat here we go and I think so Julie makes a really good point there.

580

01:25:53.820 --> 01:25:57.360

Stephanie Bogan: candace any feedback on things to do, around that.

581

01:25:57.660 --> 01:26:08.160

Candice Carlton: yeah so i'm specifically when you're taking a digital approach I just shared an article that has been really helpful we co authored with a firm that's already in a box, so their compliance experts.

582

01:26:08.550 --> 01:26:17.490

Candice Carlton: And so, a lot of our advisors have been using us to begin conversations with their compliance departments and at the broker dealers were in those conversations, often because.

583

01:26:17.850 --> 01:26:30.000

Candice Carlton: The world has evolved everyone's going to be using video, and so a lot of the times there's no compliance reasons why you can't use video it's just the interpretation of your specific so if that's helpful in some way, so I think.

584

01:26:30.420 --> 01:26:39.090

Candice Carlton: That, in that case, then you're just in person touch points become more important, but I think we're at the point where we should be pushing that conversation yeah.

585

01:26:39.990 --> 01:26:48.600

Stephanie Bogan: yeah The world is virtual whether your compliance department agrees with you or not, which again to some of the limitations that you have to work through compliance is funny.

586

01:26:49.290 --> 01:26:55.920

Stephanie Bogan: we've got about two minutes so we're going to wrap it up we'll post additional questions on slide oh from slide oh on to try.

587

01:26:56.310 --> 01:27:03.480



Stephanie Bogan: answer the ones we can, but as I said, Julie and Candace are both going to be back on about a month from now, I think, a couple of times.

588

01:27:03.780 --> 01:27:16.830

Stephanie Bogan: So we'll do the deeper dives with them, but I remember, we were working on a brand brochure for a client back in the day and that compliance department for clients 5 million and above they wanted me to use the word nest egg.

589

01:27:17.430 --> 01:27:18.000

Stephanie Bogan: Instead of.

590

01:27:18.030 --> 01:27:23.040

Stephanie Bogan: Instead of wealth and I was like huh so to candy yeah.

591

01:27:23.790 --> 01:27:34.830

Stephanie Bogan: Well, you know, so you know tennis is point like if you are in that box you step one is don't assume that you have to stay in that box and you don't know where those push points are.

592

01:27:35.160 --> 01:27:43.350

Stephanie Bogan: But if you can get sort of an outside compliance perspective that does suggest that it is OK, if these gives you a business case for.

593

01:27:43.740 --> 01:27:47.340

Stephanie Bogan: Right, this is something I feel like I need to be able to do in my business environment.

594

01:27:48.330 --> 01:27:57.000

Stephanie Bogan: And I think I've heard Julie say it just really echoes I think I can just set it and Julie accurate, it makes all the other touch points so much more important.

595

01:27:57.810 --> 01:28:05.640

Stephanie Bogan: Because you don't have the addition of that sort of authenticity right here in your space piece because video is especially now.

596

01:28:06.300 --> 01:28:11.160

Stephanie Bogan: Because we're all so accustomed to it, not that we all love it, but that we are accustomed to it.

597

01:28:12.150 --> 01:28:20.460

Stephanie Bogan: It does feel if I see Julie on video for 30 seconds I get more of that human in person experience my brain can't help it.

598

01:28:20.820 --> 01:28:28.920



Stephanie Bogan: If I see her and hear her at the same time versus reading an email and sort of going through the thought process of attaching that to her.

599

01:28:29.280 --> 01:28:35.130

Stephanie Bogan: It does sort of pass through all your brain barriers and like Oh, except wonderful person I like Oh, do they have to say.

600

01:28:35.550 --> 01:28:42.210

Stephanie Bogan: So, like there are there is some good research around the idea that right, it does really work so even if you start.

601

01:28:42.570 --> 01:28:49.560

Stephanie Bogan: practicing in little ways again candace and Julia will be back to talk more about this, but really hopefully what we talked about today.

602

01:28:49.830 --> 01:29:05.700

Stephanie Bogan: will help you start to expand and elevate your thinking around what the client experience is in terms of touch points from a thought feeling response and behavior perspective what's tangible what's intangible.

603

01:29:06.030 --> 01:29:14.220

Stephanie Bogan: What are you influencing versus what are you controlling and then, how do you weave all that together in a standardized systematic.

604

01:29:14.640 --> 01:29:21.360

Stephanie Bogan: Ultimately automated way as much as possible, so that all your time is spent actually engaging.

605

01:29:21.750 --> 01:29:33.390

Stephanie Bogan: With the client and thinking on their behalf, and then all of that excellence is built into the machine that we will talk about as we go through the course of the year, so I want to thank you Julie and you candace.

606

01:29:33.690 --> 01:29:34.980

Stephanie Bogan: yeah fabulous guests.

607

01:29:35.010 --> 01:29:50.340

Stephanie Bogan: I know there's more questions, and I know you guys are going to have a lot more after their session so be on the lookout for those Thank you we're using we're learning to use our little modi's in zoom for for practicing our Community and get from over here so like a Dan I.

608

01:29:53.490 --> 01:29:57.540

Candice Carlton: think you are so nice to see all of you and all the questions looking forward to the next section.

609



01:29:57.930 --> 01:29:59.490

Stephanie Bogan: Absolutely we'll see you soon.

610

01:29:59.550 --> 01:30:06.750

Stephanie Bogan: All right, everybody, I will see you on tribe be on the lookout for your weekly coaching videos it is part of my commitment to virtual value.

611

01:30:07.140 --> 01:30:14.100

Stephanie Bogan: i'm going to tell you I don't think they're all the best videos i've ever done I don't sit around for two and a half hours doing them but it's part of the.

612

01:30:14.340 --> 01:30:23.580

Stephanie Bogan: My job is to show up and coach you every week from a place of like what can I communicate to these people that I committed to and I care about like what do I want to drop into their personal space this week.

613

01:30:23.970 --> 01:30:32.250

Stephanie Bogan: To keep them engaged and informed and motivated about what's possible for them so that's what you're always going to find that however imperfect and maybe.

614

01:30:32.490 --> 01:30:37.140

Stephanie Bogan: However, sweaty I might be the moment that I record it whatever the background, maybe.

615

01:30:37.410 --> 01:30:45.930

Stephanie Bogan: that's our personal space right i'm not doing that, so it can get posted on In fact I was like these don't go on YouTube like these need to be behind our wall because.

616

01:30:46.260 --> 01:30:55.890

Stephanie Bogan: I don't want to worry about those things this and that's the relationship that i'm using video for in that space and candace will be very proud of me as with Julie.

617

01:30:56.280 --> 01:31:04.050

Stephanie Bogan: Every call we've had since we've done that I start every call with hey be on the lookout for your weekly inbox it's in there, the videos there were doing good stuff there.

618

01:31:04.320 --> 01:31:09.420

Stephanie Bogan: go there and engage right because that's the touch point that we're trying to remind you so i'm sharing that because.

619

01:31:09.690 --> 01:31:19.470

Stephanie Bogan: We really do try to follow our own advice and the best practices and one of them is imperfect action if I waited to do perfect videos as Lisa was like I hate video I don't want to do, video and.



620

01:31:19.920 --> 01:31:24.150

Stephanie Bogan: everyone's like why don't you want to do, video on my mom issues, issues.

621

01:31:25.020 --> 01:31:30.150

Stephanie Bogan: And then I was like you know my own advice is like it's not about me it's about you it's about a message.

622

01:31:30.570 --> 01:31:37.770

Stephanie Bogan: The end the meaning behind it and so that was the commitment I made i'm just going to show up and i'm going to do videos and it went from being a two hour fair to being.

623

01:31:38.160 --> 01:31:44.970

Stephanie Bogan: To canada's point when you sit down and you decide what you want to say, and you write a couple bullet points and you think it through it's you know it's a 510.

624

01:31:45.180 --> 01:31:52.950

Stephanie Bogan: Sometimes 20 minute affair, depending on what it is that day, and you do get better and better at it, because it becomes a comfort state for you.

625

01:31:53.490 --> 01:32:03.510

Stephanie Bogan: it's not the thing that you're doing is you're sitting down and recording a video to Dan or to Jane or to your centers of influence and it just becomes another comfortable form of conversation.

626

01:32:03.960 --> 01:32:14.700

Stephanie Bogan: All the things that julie's talking about are tangible touch points or invisible ones that we're making tangible, but the same concept like how do they have slot in.

627

01:32:15.120 --> 01:32:23.670

Stephanie Bogan: In a way, that creates influence or impact if you're not doing one of those two things i'll add information right sharing important information.

628

01:32:24.120 --> 01:32:30.030

Stephanie Bogan: Sharing you know, creating influence or doing something that will have impact and there's no point in having an engagement touch point.

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01:32:30.780 --> 01:32:38.370

Stephanie Bogan: Right, but if you're doing something that you think is mundane that covers one of those things let's find a way to build it into the engagement cycle communicate about it.

630

01:32:38.730 --> 01:32:45.960

Stephanie Bogan: It again, it might be 113 minute video at the end of quarter, with all the boring stuff in it, but the idea is to really let people know.



631

01:32:46.440 --> 01:32:53.190

Stephanie Bogan: How you're delivering value and we'll bring a system to that in May, so I hope the time with Candace and Julian I today.

632

01:32:53.520 --> 01:33:01.770

Stephanie Bogan: Really kind of you know what your whistle as they like to say and got your wheels turning so that we can head into May getting real clear how to build.

633

01:33:02.010 --> 01:33:10.140

Stephanie Bogan: Business systems around the level of experience and engagement that we're talking about all right Julie Thank you so much for your time today, as always, thank you.

634

01:33:11.490 --> 01:33:16.560

Stephanie Bogan: And we will see you all in Toronto good vibes tribe have a great day bye everybody.

