

# LIMITLESS Coaching Call Transcript

APRIL 26<sup>TH</sup>, 2021  
LIMITLESS OFFICE HOURS TRANSCRIPT

49

00:15:20.070 --> 00:15:32.760

Stephanie Bogan: Alright, everyone, this is the April launch office hours for launch 2021, and today I have coached tanya with me, we are fresh off the lifestyle calls so we're like we're all warmed up and ready to go.

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00:15:33.300 --> 00:15:41.700

Stephanie Bogan: And what we wanted to do this call, I think you're all very familiar with tanya story at this point, but what I what we wanted to do with today's call.

51

00:15:42.090 --> 00:15:53.550

Stephanie Bogan: is really talk through not any of the specific lessons because we've gone through all of those but just have you look at what you're seeing on your screen right now, so those first two rows are the lessons that we've covered.

52

00:15:53.880 --> 00:15:57.960

Stephanie Bogan: sort of the official lessons we've covered today I know we've covered a lot around the edges.

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00:15:58.860 --> 00:16:07.680

Stephanie Bogan: And that last row is what's coming up at the May retreat how to use the one page plan what Carl richards and I are calling the school of advice, how to use the one page plan.

54

00:16:08.130 --> 00:16:18.600

Stephanie Bogan: perform goals based client reviews model meetings, the amazing first meeting and then like the engine that makes it all work the service system service model searches and then the prospect process so.

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00:16:18.900 --> 00:16:25.800

Stephanie Bogan: This is really the engine in your car that you know those levers that you're pulling right the machine the machinery, if you will.

56

00:16:26.220 --> 00:16:43.440

Stephanie Bogan: So, as we start to make that transition, as we wrap up the next couple of weeks, you should have been watching the coaching drops that we're putting in the weekly inbox insights one from candace one from Julie, did you all see those the practice or emoticons today I do that.

57

00:16:44.790 --> 00:16:46.080

Stephanie Bogan: Or do I get those on my screen.



58

00:16:47.400 --> 00:16:49.500

Stephanie Bogan: here's my grid all right.

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00:16:51.690 --> 00:16:59.550

Stephanie Bogan: Alright, thank you Betty for that emoticon Dan cost again Leo GEO Eric Mike rob how about you all.

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00:17:02.070 --> 00:17:11.100

Stephanie Bogan: Right So those are just little assignments that you all can be doing to really sort of reframe your thinking and get ready for retreat what tanya and I want to do with you today.

61

00:17:11.670 --> 00:17:22.680

Stephanie Bogan: Is sort of just do a check in on where you are and do any unstuck anything that we like to call it getting unstuck that we can help you on any of those lessons or issues around the lessons in the.

62

00:17:23.220 --> 00:17:33.420

Stephanie Bogan: First, two rows so here's where I want to invite us all to start today is in the chat I want you to just pause for a moment think about everything that you see on that screen.

63

00:17:34.170 --> 00:17:40.590

Stephanie Bogan: and have those lessons and the things that you've been working on pushing forward on maybe even struggling with what is the number one issue.

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00:17:41.310 --> 00:17:51.330

Stephanie Bogan: solved as like thing that you could do to get unstuck that would really push your you know expand your momentum and push you forward so we're going to literally take a moment.

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00:17:52.380 --> 00:18:00.570

Stephanie Bogan: And i'm going to ask you all to type that in the chat what's your number one thing if you could ask solve share decide it would help you move forward.

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00:18:02.730 --> 00:18:05.070

see what we've got coming on here chat.

67

00:18:08.880 --> 00:18:10.410

Tanya Nichols: had bought the on my shirt.

68

00:18:11.670 --> 00:18:14.880

Stephanie Bogan: Oh i'm not you know it was good, not right.

69



00:18:15.120 --> 00:18:16.260

Stephanie Bogan: with ease and niche.

70

00:18:18.300 --> 00:18:21.870

Stephanie Bogan: Who else there's more than Betty on this call, I see many of you.

71

00:18:22.980 --> 00:18:24.120

Stephanie Bogan: niche fees.

72

00:18:25.560 --> 00:18:27.030

Stephanie Bogan: Great Brian Nathan.

73

00:18:28.200 --> 00:18:29.760

Stephanie Bogan: trenches it's literally starting.

74

00:18:33.510 --> 00:18:36.570

Stephanie Bogan: Getting comfortable to say yes meetings great MIC.

75

00:18:38.040 --> 00:18:38.430

awesome.

76

00:18:40.830 --> 00:18:54.900

Stephanie Bogan: Alright, so you guys keep dropping those in now, anyone who has one or wants to work on one I want you to think about tanya do you want to talk a little bit about the the first unsticking process that you and I went through.

77

00:18:55.980 --> 00:19:00.660

Stephanie Bogan: Back in the day, do we have next slide here I just sent this one here i'm going to turn this on.

78

00:19:01.290 --> 00:19:01.800

The.

79

00:19:05.040 --> 00:19:16.980

Tanya Nichols: You know, when I first got to limitless um I you know most of you have heard the story within the first 90 days I opened my office I left some difficult.

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00:19:17.310 --> 00:19:25.740

Tanya Nichols: relationships at home and work I launched my brand I hired my right hand within the first six months did a whole remodel of the office.

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00:19:26.370 --> 00:19:41.970

Tanya Nichols: I did make some massive progress in the first six months, but there was an area that I was really stuck like those things were just like they were ready to emerge and then at the September retreat, we were in Las Vegas and Stephanie asked.

82

00:19:43.080 --> 00:19:52.050

Tanya Nichols: you've got poker chips back then, whoever got enough poker chips got to go to lunch with the coaches, and so I was just raising my hand for everything, because I wanted to go to lunch with the coaches or dinner with coaches.

83

00:19:52.440 --> 00:20:06.810

Tanya Nichols: So I'm up on stage and Stephanie was trying to unstuck me on a particular conflict or issue that I was having with some business partners like I was all swirled around in my head I didn't even know what the real problem was.

84

00:20:07.320 --> 00:20:12.900

Tanya Nichols: And I was honest enough to be able to say something along the lines of.

85

00:20:14.040 --> 00:20:20.100

Tanya Nichols: You know my my business partners like we we split up, it was a bad breakup and I had this hang up.

86

00:20:20.580 --> 00:20:31.680

Tanya Nichols: That it was actually like I wasn't enough somehow that that's what that meant by our partnership breaking up that I wasn't enough for them, that was the story that was what she sorted out.

87

00:20:32.010 --> 00:20:38.250

Tanya Nichols: And it was really renting space from me, being able to tell my story authentically about my business and my brand.

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00:20:38.550 --> 00:20:51.300

Tanya Nichols: I was still really afraid to market, I was afraid to niche I was afraid to change my fees, I was really just afraid and all of those areas I would not have been able to say that I was afraid at the time that's really important.

89

00:20:52.260 --> 00:20:57.930

Tanya Nichols: I would have I just I didn't know and so we're on the stage and the frame of the story is.

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00:20:59.340 --> 00:21:05.970

Tanya Nichols: Well, my business partners, they didn't want me because I must be bad or they must say I'm not enough for them is the bottom line.

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00:21:06.300 --> 00:21:10.740

Tanya Nichols: And Stephanie talked to me through reframing that story into one in which.



92

00:21:11.100 --> 00:21:26.550

Tanya Nichols: They actually weren't enough for me, not that they were bad people or anything but just actually the situation, the environment, the circumstances it actually wasn't right for me, I was able to get true like shed the old story which.

93

00:21:26.580 --> 00:21:27.390

Like was hurt.

94

00:21:28.470 --> 00:21:30.000

Tanya Nichols: hurting me to my core.

95

00:21:30.270 --> 00:21:31.290

Stephanie Bogan: And blocking me from.

96

00:21:31.290 --> 00:21:35.100

Tanya Nichols: doing all this cool stuff and really reframe it to such a point that.

97

00:21:36.450 --> 00:21:49.320

Tanya Nichols: I didn't want that I actually didn't want the thing that I thought I wanted, I was so stuck on them not wanting me that I couldn't even see clearly so I reframed that and it like everything opened up the next year I should email.

98

00:21:50.040 --> 00:22:02.340

Tanya Nichols: I increase my minimums from 4000 to 7500 a year and a half a million dollars in the town with \$44,000 and household income narrowed my niche to women within a few years of retirement and.

99

00:22:03.870 --> 00:22:09.270

Tanya Nichols: While we were doing searches Oh, and then raise my fees by like a lot on some clients.

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00:22:09.780 --> 00:22:12.990

Tanya Nichols: So I did a ton of stuff in the 12 months.

101

00:22:13.290 --> 00:22:21.930

Tanya Nichols: Getting after I got unstuck on that stage, so those of you that are brave enough to post in the chat that's what we're hoping to do today if you've got something you're stuck on.

102

00:22:22.110 --> 00:22:32.130

Tanya Nichols: And it may not be deep in like to your core level like that was for me, but a lot of times if we're procrastinating on something, it is because there's some big hang up in the back of our mind that we're.



103

00:22:32.430 --> 00:22:38.190

Tanya Nichols: Just we're just stuck on we can't get through the story that overplays in or that plays over and over in our subconscious.

104

00:22:38.820 --> 00:22:45.330

Stephanie Bogan: So tanya and I thought it would be fun to take our time today so take the next 15 minutes and really just go through.

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00:22:45.720 --> 00:22:51.000

Stephanie Bogan: sonic some clarity coaching mobile take whoever First, I think, better you were first, if you want to start.

106

00:22:51.450 --> 00:23:01.500

Stephanie Bogan: And we'll try and try and take five to seven minutes to just do some open coaching with you, and maybe not to solve the entirety of the issue in five to seven minutes, but to get some clarity around.

107

00:23:01.860 --> 00:23:09.420

Stephanie Bogan: What might be stuck in you and what is a good next step to move forward to get the clarity that you need to start to solve, for whatever you need to solve for and then.

108

00:23:09.720 --> 00:23:19.560

Stephanie Bogan: We want to invite all of you is we're talking with each one of you that when we're coaching one of you we're really coaching all of you so, whatever your issue is in the chat or that is in your head.

109

00:23:20.040 --> 00:23:27.270

Stephanie Bogan: be asking yourself, those same kinds of questions and seeing how it resonates around the issues that you're reflecting on sound like a plan.

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00:23:30.120 --> 00:23:32.640

Stephanie Bogan: All right, let's see Betty do you want to start.

111

00:23:34.230 --> 00:23:34.530

Stephanie Bogan: either.

112

00:23:34.560 --> 00:23:37.080

Betty Wang: For her i'm here i'm.

113

00:23:38.310 --> 00:23:50.040

Stephanie Bogan: hold on, let me level set so if you can get if you guys take a minute or two to give us the context, on the issue and what you think the ask or share is and then tanya and I will unpack it a little bit and we'll see where we end up.



114

00:23:50.370 --> 00:23:51.780

Tanya Nichols: And allison might gong us.

115

00:23:51.870 --> 00:23:52.260

So don't.

116

00:23:53.640 --> 00:23:54.180

Stephanie Bogan: song.

117

00:23:54.360 --> 00:24:00.240

Betty Wang: Yes, I just feel stuck nothing I came to last week's quarterly.

118

00:24:00.930 --> 00:24:13.680

Betty Wang: coaching hour and I was going to skip to the service model, but you asked me, you know why are you skipping the story piece, and the niche piece so i've been taking some time going through all the.

119

00:24:14.340 --> 00:24:31.080

Betty Wang: What I could find on limitless the previous coaching and trying to hone down on fees and my niche and I just I got stuck and i've started to try to journal, and I know it's.

120

00:24:32.580 --> 00:24:34.170

Betty Wang: I don't know what it is, I guess.

121

00:24:34.830 --> 00:24:39.780

Stephanie Bogan: The what's the goal in creating the fee structure for you like what's the outcome that you want to create.

122

00:24:40.620 --> 00:24:41.190

clarity.

123

00:24:44.550 --> 00:24:46.290

Stephanie Bogan: For you, in the clients presumably right.

124

00:24:47.220 --> 00:24:48.360

Betty Wang: Well, I think, for me.

125

00:24:50.010 --> 00:24:51.090

Betty Wang: yeah I mean.



126

00:24:51.270 --> 00:24:55.560

Betty Wang: Yes, yes, and I think it's I think it's I needed in my brain.

127

00:24:55.860 --> 00:25:03.000

Stephanie Bogan: So if you could charge them any way you want any amount that you wanted that you thought was fair and reasonable like How would you charge them, based on what you know right now.

128

00:25:04.140 --> 00:25:08.070

Betty Wang: i'm leaning toward financial planning fees and a lot okay.

129

00:25:09.000 --> 00:25:19.620

Betty Wang: So what I am a solo entrepreneur lifestyle and I was trying to stay away from creating extra admin work for myself.

130

00:25:20.220 --> 00:25:20.550

Okay.

131

00:25:21.930 --> 00:25:32.790

Stephanie Bogan: So is the ask their structural you know, should I do am fees, because I just don't have to do any extra work in terms of just having a basic billing process for is.

132

00:25:32.880 --> 00:25:34.140

Betty Wang: No, I mean my.

133

00:25:34.740 --> 00:25:35.880

Betty Wang: i'm stuck with.

134

00:25:37.020 --> 00:25:45.660

Betty Wang: I enjoy the different people i've met all through the different you know retirees early, I think we kind of talked about it last week.

135

00:25:48.210 --> 00:25:51.720

Betty Wang: And my original niche was going to be high income women.

136

00:25:53.400 --> 00:26:02.550

Betty Wang: I mean my focus started with women and then it was high income, then I really enjoy the technical stuff of stock options, but it's sort of my.

137

00:26:03.120 --> 00:26:20.160

Betty Wang: Last week, you said something that resonated with me was that people start their business from



inspiration intellect and income, so I started with inspiration and my intellect right, and now that i'm getting into it, I sort of want the income to.

138

00:26:24.150 --> 00:26:39.630

Betty Wang: So it but that's been sort of a shift for me where i'm like Okay, I feel, just as good helping somebody with \$10 million, as I do, with the \$50,000 client that I have which I have both right so it's it's sort of like.

139

00:26:41.100 --> 00:26:44.520

Betty Wang: um and the purse little.

140

00:26:44.550 --> 00:26:57.630

Stephanie Bogan: what's the plan for the clinic in your ideal what's the client base without worrying if I gave you a pill That said, they will love you, no matter what they would thank you for any changes there will be no pain or discomfort whatsoever what's the ideal client base.

141

00:26:59.700 --> 00:27:05.850

Betty Wang: I think I said, you know later generation X high income independent women.

142

00:27:07.620 --> 00:27:16.080

Betty Wang: Who are you know 10 years I like to be where my advice can actually change the course.

143

00:27:18.330 --> 00:27:32.310

Betty Wang: And that's why lately i've been i've been taking on a lot of couples who are younger just one time plan, and I find that I really like that, too, because if it really matters right if they make certain changes at age 32.

144

00:27:34.140 --> 00:27:34.980

Betty Wang: That matters.

145

00:27:35.250 --> 00:27:48.090

Stephanie Bogan: Right your your work is going to create positive impact if you do it well, no matter where you focus it right, so at some point the idea of selection is important in terms of where can you best focus it to have that impact in a way that also.

146

00:27:48.450 --> 00:27:59.280

Stephanie Bogan: Has the impact that you want, on your business and life and what I hear you saying is you'd love to work with these sort of high income, maybe executive stock option women in their 50s raid on their path to retirement.

147

00:28:00.690 --> 00:28:01.020

Betty Wang: Yes.

148

00:28:01.770 --> 00:28:04.110



Stephanie Bogan: Okay, why the hesitation.

149

00:28:05.370 --> 00:28:07.680

Stephanie Bogan: Right, I heard, yes, not yes.

150

00:28:12.060 --> 00:28:14.820

Betty Wang: Because most of the people I know aren't there yet.

151

00:28:16.260 --> 00:28:18.630

Betty Wang: And I want to help them to cry.

152

00:28:20.190 --> 00:28:29.940

Stephanie Bogan: So I think you're going to need to fundamentally decide if you really feel like you need you can help everyone, but is it the rich, can you and, should you were very different questions.

153

00:28:31.290 --> 00:28:33.390

Stephanie Bogan: So, what happens if you don't help everyone.

154

00:28:38.490 --> 00:28:40.590

Betty Wang: I help them find someone else okay.

155

00:28:40.830 --> 00:28:41.760

Stephanie Bogan: And how does that feel.

156

00:28:45.210 --> 00:28:46.140

Betty Wang: Like i'm.

157

00:28:47.550 --> 00:28:52.650

Betty Wang: I think I was just watching one of the coaching where they said you feel like you're going to hell like.

158

00:28:54.000 --> 00:28:55.020

Betty Wang: that's sort of how I feel.

159

00:28:56.250 --> 00:28:56.490

Stephanie Bogan: and

160

00:28:56.940 --> 00:28:58.410

Betty Wang: Like I started a bait and switch.



161

00:28:58.410 --> 00:29:07.260

Betty Wang: them right like you know I came here with this is my there's I call this my heart centered business and now here I am like.

162

00:29:08.730 --> 00:29:09.900

Betty Wang: Like I need more money.

163

00:29:11.310 --> 00:29:13.050

Stephanie Bogan: Right so.

164

00:29:13.530 --> 00:29:27.600

Stephanie Bogan: Are you a business or nonprofit because that's a fundamental decision to make because the audience at 50,000 is really let's be honest that's a nonprofit audience or a very different business model and if that's your heart, and you have the ability, economically to do that.

165

00:29:27.990 --> 00:29:38.250

Stephanie Bogan: You and I can have a really fun conversation about how to scale that for really for group of people, but that's a very different business model than right having kind of a private client practice.

166

00:29:39.780 --> 00:29:48.540

Betty Wang: Now she is an outlier I mean a maid of my business is between four to 500,000 but.

167

00:29:49.560 --> 00:30:03.000

Betty Wang: I do have a friends and family discount which was pretty significant and I am curious what I haven't come across any anything in the tribe about what people do for that yeah.

168

00:30:03.390 --> 00:30:06.900

Stephanie Bogan: So we can talk about that just your doctor have a friends and family discount.

169

00:30:08.610 --> 00:30:09.270

Betty Wang: Why don't i'm done.

170

00:30:10.380 --> 00:30:12.510

Stephanie Bogan: get your architect type of friends and family discount.

171

00:30:13.470 --> 00:30:13.800

know.

172

00:30:15.030 --> 00:30:20.010

Stephanie Bogan: Right, so I will write it put yourself in that professional model like you're in that helper zone.



173

00:30:20.790 --> 00:30:31.050

Stephanie Bogan: And like this is a heart like what I hear you can you say as you're having a struggle between your head in your heart, because if you if you lean more to the business side, and you know kind of being practical in a business level that somehow.

174

00:30:31.320 --> 00:30:33.900

Stephanie Bogan: Your money grubbing bad human being and you're going to burn in hell.

175

00:30:35.520 --> 00:30:39.210

Stephanie Bogan: Right so what's the reframe of that story like is that really true.

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00:30:41.220 --> 00:30:41.760

Betty Wang: A little bit.

177

00:30:43.950 --> 00:30:44.220

Stephanie Bogan: So.

178

00:30:46.110 --> 00:30:49.140

Stephanie Bogan: I can tell Tony wants to say something so i'm going to pause there.

179

00:30:50.400 --> 00:30:56.820

Stephanie Bogan: Well, I think that's an important recognition like if you fundamentally believe that it makes you at some level, maybe a bit of a bad person.

180

00:30:57.360 --> 00:31:00.180

Stephanie Bogan: to pull a bait and switch you're not going to get clear on like.

181

00:31:00.210 --> 00:31:10.200

Stephanie Bogan: This is what tanya was talking about when she talks about procrastination if you know you want to do something, and you have the tools and resources available to you, which is pretty much 100% block if you're in this program.

182

00:31:10.590 --> 00:31:16.890

Stephanie Bogan: And you haven't done it after 90 days you're going to really want to question your motives and if you're like i'm not sure if i've got a headspace issue.

183

00:31:17.190 --> 00:31:31.590

Stephanie Bogan: just note that someone there there's a 90% probability you've got at least a little bit of a headspace issue it doesn't mean we gotta lie on the couch it doesn't really have to cry it means we got to get clear about what stalking us so tanya do you wanna.



184

00:31:31.800 --> 00:31:39.960

Tanya Nichols: I got a couple things so where did the message come from that having money meant, you are a money grubbing jerk.

185

00:31:41.430 --> 00:31:42.090

Betty Wang: My parents.

186

00:31:44.340 --> 00:31:46.860

Betty Wang: I mean it was definitely yeah it definitely was.

187

00:31:49.170 --> 00:31:52.440

Betty Wang: it's good to make money, so that we can be rich.

188

00:31:54.690 --> 00:31:56.850

Betty Wang: But rich people are inherently not good.

189

00:31:59.670 --> 00:32:04.860

Stephanie Bogan: And if that's your story, ladies and gentlemen, if even a fraction of that is true it.

190

00:32:05.220 --> 00:32:11.820

Stephanie Bogan: Is your conscious mind going to ever get to a point where it can like it's you're not going to win that battle like your your subconscious brain and those stories.

191

00:32:12.270 --> 00:32:21.300

Stephanie Bogan: are driving the show under the surface, and so one surfacing that is super valuable because step one is is really is it really true.

192

00:32:22.530 --> 00:32:25.110

Stephanie Bogan: Does having money make you a bad person.

193

00:32:26.370 --> 00:32:34.050

Stephanie Bogan: No, no, now, can you reframe that, in a way that you could actually make a case that having money could make you a good person.

194

00:32:36.480 --> 00:32:41.910

Betty Wang: And that I would be able to help more people.

195

00:32:45.330 --> 00:32:52.380

Stephanie Bogan: So could you reframe what rich people do with money, like hey if I were rich i'd be the kind of



person who.

196

00:32:53.640 --> 00:32:56.850

Betty Wang: I were rich I would be the person who would.

197

00:32:58.650 --> 00:33:03.330

Betty Wang: donate to charities that I believe in right.

198

00:33:03.630 --> 00:33:10.590

Stephanie Bogan: So all of you right like reframing these beliefs right if I were rich I would be the kind of person who.

199

00:33:10.980 --> 00:33:20.130

Stephanie Bogan: You know, felt safe and secure I would be the kind of person who use my abundance to invest in my children church charities like whatever it is, I would be the kind of person who would.

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00:33:20.400 --> 00:33:28.980

Stephanie Bogan: Feed like get specific I would feed 5000 people I would you know donate \$25 billion to women who needed pat like whatever it is.

201

00:33:29.400 --> 00:33:47.310

Stephanie Bogan: And in the moment of hesitation and pause if you can stop and have that reframe story on tap right old way new way we call it catching correct and coaching like literally a cue like a button like hit your knee literally like pause like a tape recorder pause.

202

00:33:47.370 --> 00:33:49.440

Tanya Nichols: snap a rubber band on your wrist.

203

00:33:49.500 --> 00:33:59.880

Stephanie Bogan: And literally right like whatever it is to kind of give it's a pattern interrupt because your brain is literally this machine that's working behind the scenes neural chemicals and neural pathways.

204

00:34:00.240 --> 00:34:07.020

Stephanie Bogan: Are following all those ingrained habits and patterns and the second, that you do a pattern interrupt your brain goes okay now what.

205

00:34:07.950 --> 00:34:13.650

Stephanie Bogan: And then you have the ability to reinforce it and say you know what I used to believe you know.

206

00:34:14.070 --> 00:34:24.570

Stephanie Bogan: I have to write, I have to do the story exercise, and I have that feeling of procrastination You all



know what i'm talking about you know exactly what you're supposed to be doing and there's like this invisible force field between you in it.

207

00:34:24.870 --> 00:34:33.210

Stephanie Bogan: And it's not even clear it's like this ambiguous, I know I should do it, but it's like fuzzy and you're looking at this task list or something else, through your Amazon account and it's.

208

00:34:33.840 --> 00:34:41.130

Stephanie Bogan: The pole like you know that moment that's the moment that you stop and you go up it's happening again okay pattern interrupt right catching correct.

209

00:34:42.270 --> 00:34:54.810

Stephanie Bogan: right if I you know if I do this work it's because i'm you know i'm i'm not doing this work, because the old story is you know if I make more money and I charge people i'm going to be a rich person rich people are bad and i'm going to burn in hell news story.

210

00:34:56.250 --> 00:35:05.730

Stephanie Bogan: You know when i'm rich i'm the kind of person who and you literally in that moment, stop and reframe it and I promise you, you will only do that a couple of times before a feel better.

211

00:35:06.390 --> 00:35:14.730

Stephanie Bogan: Be you notice the procrastination pause gets you're like oh that's right that's why i'm not doing this, I need to sit down and do it and see over a period of time.

212

00:35:15.150 --> 00:35:28.020

Stephanie Bogan: That becomes the new habit, so you literally train your brain to catch and correct itself, and when you get to that point you get those like oh I just realized I did the right thing and I didn't even hesitate.

213

00:35:31.050 --> 00:35:46.500

Tanya Nichols: I got a couple things one is I have certainly had to master the helper in me I remember doing an exercise a couple years ago same kind of thing working on productivity, whatever and I did pro bono meetings.

214

00:35:46.770 --> 00:35:50.640

Tanya Nichols: yep, so I would just that was my deal I wouldn't take you on as a client.

215

00:35:51.630 --> 00:35:59.100

Tanya Nichols: But I would do pro bono meeting and just give you financial advice like if you were referred to me from a friend or family from an existing client whatever I do this pro bono meaning.

216

00:36:00.060 --> 00:36:12.510

Tanya Nichols: And I recognized for me and other people do those and it's you know i'm not saying they're wrong i'm just saying, for me, I was really working on mastering my time so I could spend more time with my kids I had the big priority of I was going to work 30 hours a week or less.



217

00:36:12.810 --> 00:36:19.530

Tanya Nichols: And I was going to measure the year laugh, I was going to measure the amount of time I laughed with my kids I had the biggest scrapbook i've ever made in.

218

00:36:20.940 --> 00:36:30.000

Tanya Nichols: Because that was my priority and my intention, and so one of the things I had to that was a below the line activity that I had to get rid of was pro bono meetings.

219

00:36:30.570 --> 00:36:34.470

Tanya Nichols: You know, like the 30 year old it's figuring out their 401k and needs to pay off their credit card debt.

220

00:36:35.010 --> 00:36:54.120

Tanya Nichols: yeah I can do that in 45 minutes, but I also that's 45 minutes of grace's time so actually wrote that down grace's my daughter she's 13 now my son is laying he's 12 and I was a single mom and I remember that time I was giving to this 30 year old person was grace's time.

221

00:36:55.140 --> 00:36:59.280

Tanya Nichols: And there's so much as that that I can apply to my work day today, so that helper part of me.

222

00:36:59.880 --> 00:37:05.280

Tanya Nichols: I still help I do it in ways by contributing Debord work I teach Community ED classes.

223

00:37:05.550 --> 00:37:17.340

Tanya Nichols: twice a year when it's not a pandemic, and they can come to that, so I just found other avenues to get those people help I just recognized I didn't have to be the one to do it and I didn't need the gold star anymore.

224

00:37:17.760 --> 00:37:22.380

Tanya Nichols: from being the good girl who helps everyone, because it was coming at the sacrifice of my kids time.

225

00:37:24.870 --> 00:37:40.260

Tanya Nichols: Okay The other thing I thought of was when it comes to fees and time was, it is also my responsibility as an entrepreneur, and as a business owner who already has existing clients who hire me and pay me to create a sustainable business.

226

00:37:41.400 --> 00:37:50.640

Tanya Nichols: So as a non wire like i'm running my own operation, if I screw this up because i'm an idiot about fees or I give them my time away or I take on too many clients.

227

00:37:50.970 --> 00:38:02.520

Tanya Nichols: You know my clients really they depend on me and i'm sure they really depend on you to make sure



you're running a tight ship, so we have an obligation to them as well and that helped me move the fee needle in 2019.

228

00:38:04.470 --> 00:38:08.040

Stephanie Bogan: And what time is doing there she's giving you contrast so when you think about.

229

00:38:08.160 --> 00:38:20.760

Stephanie Bogan: Changing that behavior instead of it's just I have to stop doing this it's you're getting the contrast of Oh, this is grace's time or this is that \$200,000 that stephanie talks about when she talks about the fake you know the invisible money on the table.

230

00:38:21.060 --> 00:38:24.750

Stephanie Bogan: Right take a picture of a pile of money and put it on your you know, on your desk.

231

00:38:25.020 --> 00:38:32.340

Stephanie Bogan: Whatever is that motivator to you because that's what the big great that's why the big wise and the outcomes, as you want to get really clear on what you're moving to.

232

00:38:32.730 --> 00:38:36.930

Stephanie Bogan: And then I think tanya alluded to it in terms of then you're now you're in method land.

233

00:38:37.650 --> 00:38:46.110

Stephanie Bogan: In terms of how you create those changes, who you're talking to how you're talking to them, but it really starts with getting clear on what you're communicating.

234

00:38:47.100 --> 00:38:57.480

Stephanie Bogan: And I think to her point sometimes the helping is you're going to want to figure out the source of the helping story, the story is not going to go away on its own, but you want to start to do that retraining of the catching correct.

235

00:38:58.050 --> 00:39:02.130

Stephanie Bogan: And then identify the methods that you need to implement to support that at a business level.

236

00:39:03.810 --> 00:39:04.380

Stephanie Bogan: Does that help.

237

00:39:04.740 --> 00:39:06.570

Betty Wang: Yes, so much thank you.

238

00:39:06.750 --> 00:39:07.740

Betty Wang: So thank you tanya.



239

00:39:07.980 --> 00:39:08.700

Tanya Nichols: yeah thanks buddy.

240

00:39:10.200 --> 00:39:11.940

Stephanie Bogan: Alright Trent start.

241

00:39:13.440 --> 00:39:23.370

Trent Porter: yeah so kind of my background is I started the program and start the year and then also had a newborn and then really, really dove into the Program.

242

00:39:23.760 --> 00:39:28.620

Trent Porter: did some great things and we're starting to do client surges and have that on the horizon.

243

00:39:29.340 --> 00:39:37.410

Trent Porter: took a big bite on all these things, and now it's having time over really the last couple months I haven't really dove into any other Program.

244

00:39:37.950 --> 00:39:51.330

Trent Porter: at all, so I think it leads to two questions, one is logistically where do I start back in to kind of get caught up and any tips on doing that and also, I think, more broadly, is delegating have.

245

00:39:52.380 --> 00:40:05.460

Trent Porter: To really capable staff members they're actually both PhDs and financial planning and i'm such a perfectionist I have trouble passing things off to get some of this stuff off my my plate to to free my time up.

246

00:40:07.080 --> 00:40:23.130

Stephanie Bogan: Right, what would you attribute the pause to was it, I mean life right surges take a period of time if you're doing that you've got a newborn and then, my question is where is it an intentional pause or an environmental pause like I tracked in it happened.

247

00:40:23.700 --> 00:40:29.100

Trent Porter: yeah not not an intentional pause at all it's like oh this week on women listening work on these things, and it just.

248

00:40:29.430 --> 00:40:40.710

Trent Porter: You know it's that whole urgent versus important and client issues come up and I tackle those and then at the end of the week I haven't done anything on limitless just everything else is taking my time okay.

249

00:40:41.310 --> 00:40:51.930

Stephanie Bogan: So we'll talk about the delegating in a minute, but in terms of where you start where what you



what you want to do, ultimately, is you're all going to you know, try to keep pace with the curriculum, we put a lot in there, obviously.

250

00:40:52.200 --> 00:41:02.910

Stephanie Bogan: And there's deeper obviously lessons and resources online, but each quarter you're going to want to look at what are the things that are going to move the needle in your practice and use that personal launch plan that we've been referencing.

251

00:41:03.510 --> 00:41:17.250

Stephanie Bogan: and, ideally, you can go the curriculum is outlined in the order that we recommend like we want to get clear everybody wants to grow, we know that, but we want you, you don't want to trust me people come to me to grow all the time, and my responses.

252

00:41:17.640 --> 00:41:26.670

Stephanie Bogan: Do you want twice the time twice the headaches twice the staff twice problems right now twice the expenses, now we don't, which means that we have to tighten and refine the ship.

253

00:41:27.330 --> 00:41:32.490

Stephanie Bogan: Before we start really scaling it doesn't mean we don't want you to do the continuous growth that you're working on.

254

00:41:32.850 --> 00:41:42.600

Stephanie Bogan: But for you it's about do you have the clarity and accountability piece in place, because you have pretty signal a newborn is a pretty significant undertaking it's an incredible one.

255

00:41:43.530 --> 00:41:53.010

Stephanie Bogan: But routine is just like with babies routine is really important to getting that, like the dependable nighttime routine that you can count on like it really is the same.

256

00:41:53.670 --> 00:42:00.810

Stephanie Bogan: So, going back to that very first series of lessons and have you clarified your bottle practice like are you really clear on what you're here to build.

257

00:42:03.030 --> 00:42:03.900

Trent Porter: Listen, I think.

258

00:42:04.650 --> 00:42:21.450

Trent Porter: Yes, yes, yes, we have done that, and actually even just the little bit that i've done we've made leaps and bounds of raising our fees not doing one time work, not doing hourly work, so I think we are clear on that, and so I think that it's actually just putting into place.

259

00:42:22.830 --> 00:42:23.160

Stephanie Bogan: that's.



260

00:42:23.640 --> 00:42:34.320

Stephanie Bogan: what's what's the next big lever, that you can pull as you sort of look at the agenda have you nailed it sounds like you've covered fees so i'm assuming you've got story in niche down yeah.

261

00:42:35.130 --> 00:42:39.480

Trent Porter: Not niche niche tech is our next big piece and that's been yeah.

262

00:42:40.500 --> 00:42:52.470

Stephanie Bogan: Alright, so you can do anything in limitless without a niche and it will add not gonna lie to you, it will improve your practice there's no question, if you do it with a niche it'll like three x improve your practice yeah.

263

00:42:52.500 --> 00:42:53.310

Trent Porter: I mean we agree.

264

00:42:54.420 --> 00:43:01.170

Trent Porter: We agree with that, I think that to me it comes down to my perfectionism I want it to be perfect and millet it's gonna work before actually.

265

00:43:01.230 --> 00:43:08.670

Stephanie Bogan: jump into is this and I don't know where to start or it's an I know where Do I need to start with my niche, but I just am too much of a perfectionist to pick one.

266

00:43:09.270 --> 00:43:10.680

Trent Porter: Yes, definitely the perfectionist.

267

00:43:11.070 --> 00:43:15.120

Stephanie Bogan: Anyone that's paying attention that's why he's been distracted for the last two months.

268

00:43:15.870 --> 00:43:24.780

Stephanie Bogan: Because when you hit one of those things that you don't have clarity and uncertainty around and you don't identify it and push through it, which is why Todd and I are taking you through this today.

269

00:43:25.290 --> 00:43:31.410

Stephanie Bogan: you're going to find you kind of do like a soft curve and you don't even know why you're like Oh, I want to look at my email Oh, I want to do and.

270

00:43:31.620 --> 00:43:41.220

Stephanie Bogan: You will allow distractions that you don't otherwise because that focus is your backstop your brain is always like we can't do this because we have to get this done and when that's not there.



271

00:43:41.640 --> 00:43:45.750

Stephanie Bogan: It allows for wondering so that's where the clarity piece is really important, so.

272

00:43:46.590 --> 00:43:56.580

Stephanie Bogan: We could spend more time together, and I could give you the like i'm certain on that, but i'm going to give you the i'm 90% certain that that's like the hemming and the hiring is because you just know you need to face that.

273

00:43:57.000 --> 00:44:01.920

Stephanie Bogan: And the perfectionist you doesn't feel prepared to make that decision, if I had to guess, and then we.

274

00:44:02.160 --> 00:44:06.450

Stephanie Bogan: pressured and then we look for other things because it's so much easier, yes.

275

00:44:06.510 --> 00:44:14.100

Stephanie Bogan: Exactly alright, so the niche, I think, is the issue, and then we can we can go a little bit further, but I see tanya leaning in which means she that she's at the point where.

276

00:44:14.280 --> 00:44:17.220

Tanya Nichols: You know i'm just I that I was just gonna I was.

277

00:44:17.250 --> 00:44:19.770

Tanya Nichols: My the things I wrote down, where is this why you're stuck.

278

00:44:20.250 --> 00:44:27.330

Tanya Nichols: yeah you know, so I took the same thing and then asking if there was a project that you had energy around and.

279

00:44:28.110 --> 00:44:40.170

Tanya Nichols: But it sounds like a niche was a hard one for me, too, I didn't think I needed to do it, and so it took me, I think I did that in year late year two or maybe early year three I can't remember.

280

00:44:40.650 --> 00:44:46.740

Tanya Nichols: And it just like all of a sudden just was like this is what we do it didn't need to be any more complicated than it was.

281

00:44:47.040 --> 00:44:56.820

Tanya Nichols: I didn't I didn't burn the ships personally it's, of course, I think, for many, it is better to burn the ships you'll have a greater outcome that was less important to me at the time, so.



282

00:44:58.620 --> 00:44:59.970

Tanya Nichols: So, what are you going to do next on it.

283

00:45:02.430 --> 00:45:08.880

Trent Porter: that's just pulling the trigger and and committed and I guess putting yourself out there and how we do that, I don't know.

284

00:45:09.450 --> 00:45:13.980

Stephanie Bogan: Do you have the information you need to make a 70% confident decision.

285

00:45:15.090 --> 00:45:19.200

Stephanie Bogan: yeah okay So what if you had to launch tomorrow, what would the niche be.

286

00:45:20.130 --> 00:45:34.890

Trent Porter: So we want to work with retirees around one understanding if they have enough, and then, once they have decided to have enough putting together a game plan to give it away so through charitable giving and giving the family, whether they do it now, and whether they do it later okay and.

287

00:45:34.950 --> 00:45:40.920

Stephanie Bogan: Just retirees in general retirees now people about to give me the Where are you in the retiree life cycle.

288

00:45:41.850 --> 00:45:43.380

Trent Porter: That I don't know OK.

289

00:45:44.160 --> 00:45:54.600

Stephanie Bogan: So the clear, you can get about that the more efficient your systems can be the more effective your marketing can be and so that's the piece, especially if you're in the giveaway piece.

290

00:45:55.080 --> 00:46:05.760

Stephanie Bogan: you're probably they're going to be earlier business, you know people in businesses who are planning retirement or people who are closer and then you want to think about do you want to frame it around the source of the wealth.

291

00:46:06.870 --> 00:46:15.570

Stephanie Bogan: Right, the Trust Fund babies are one very different type of client versus business owners who have a king, you know you know first generation business owners who built their own wealth.

292

00:46:16.020 --> 00:46:24.450

Stephanie Bogan: So, similar to the conversation that we were having earlier, you know to your time you had a great



question around what's an energy project like if you can think inside that niche.

293

00:46:24.990 --> 00:46:36.240

Stephanie Bogan: Around sort of smaller audiences within it, which are still very, very deep and big for you like, is there any group that gives you more energy like Oh, we really liked the idea of business owners earlier in the life cycle.

294

00:46:36.750 --> 00:46:45.150

Stephanie Bogan: You know who are in you know sustainable businesses that's you know we know those people are going to be into legacy like if you have it, you know just have you given any thought to that and.

295

00:46:45.720 --> 00:46:53.610

Stephanie Bogan: I would suggest that would be a good place to explore, because I think niches is your next big thing because it's like it ripples to and through everything else.

296

00:46:55.200 --> 00:46:56.580

Trent Porter: That makes sense okay.

297

00:46:57.480 --> 00:47:01.020

Stephanie Bogan: Do you have what you need in place to have that conversation internally.

298

00:47:02.100 --> 00:47:02.940

Trent Porter: yeah I think so.

299

00:47:03.420 --> 00:47:06.150

Stephanie Bogan: Alright, so your next step, then, will be wet and by when.

300

00:47:09.420 --> 00:47:19.740

Trent Porter: talk with my team and then just make the mental commitment and then also decide how specific and where, in the cycle of retirees and.

301

00:47:20.880 --> 00:47:21.750

Trent Porter: Then pull the trigger.

302

00:47:22.440 --> 00:47:27.330

Stephanie Bogan: Alright, so do you want to share that between making a decision and pulling the trigger.

303

00:47:28.080 --> 00:47:29.400

Trent Porter: Oh, in terms of timeline.

304



00:47:30.510 --> 00:47:33.990

Trent Porter: yeah I would say, within two weeks, we should be able to do that.

305

00:47:34.410 --> 00:47:36.210

Stephanie Bogan: when's your next mastermind pod call.

306

00:47:37.200 --> 00:47:37.920

Trent Porter: I do not know.

307

00:47:38.490 --> 00:47:46.440

Stephanie Bogan: Okay, so in your next mastermind pod call if it's right it's either the next caller the call after depending on whether it's in the next two weeks or not.

308

00:47:47.040 --> 00:47:55.350

Stephanie Bogan: That would be a good place for that accountability and then allison is going to make a note and we're going to we haven't heard from you in two weeks on triumph we're going to check in with you.

309

00:47:56.100 --> 00:47:56.850

Trent Porter: Okay, great.

310

00:47:56.910 --> 00:48:04.740

Stephanie Bogan: And if you get stuck in the process then that's when you know Ray you want to reach out and get help so that we can dive in a little bit deeper, and we can really if we need to do.

311

00:48:05.130 --> 00:48:10.620

Stephanie Bogan: If you can get through it then it's just hey I got to clarify my headspace my mindset and then put the methods to work.

312

00:48:11.010 --> 00:48:21.540

Stephanie Bogan: And if you find that you still meet with resistance that's absolutely the point that you're like okay I got to really dig into this and figure out like, why is this net coming with greater ease because you've heard over and over again.

313

00:48:21.960 --> 00:48:31.770

Stephanie Bogan: From all of the coaches when they got that clarity and that alignment the work was never effortful it doesn't mean they didn't put in the time but they weren't like.

314

00:48:33.690 --> 00:48:44.700

Stephanie Bogan: do this, it was like Okay, I did the service model thing I gotta lay out these processes that's kind of boring but i'm really am to do it because, on the other side of that oh my God i'm going to have six months of my time back holy cow let's go do that.



315

00:48:45.240 --> 00:48:54.840

Stephanie Bogan: So John you really brought up the energy piece and that's really important, because when you have that positive energy around something that stuff doesn't happen the procrastination the waffling.

316

00:48:55.140 --> 00:49:04.140

Stephanie Bogan: So that's for everyone that's the queue Trent like when you find that procrastination or that uncertainty or that just I always say this like it just doesn't feel good.

317

00:49:04.830 --> 00:49:12.480

Stephanie Bogan: that's not the energy, space, you want to be in, and that is your first and best clue that you want to just check yourself like What is this about.

318

00:49:13.080 --> 00:49:21.750

Stephanie Bogan: And sometimes it's technical like I just don't like doing I've used the Adam example he was like oh I just really don't like doing insurance analysis and I don't think I'm the best person to do it well.

319

00:49:22.080 --> 00:49:31.290

Stephanie Bogan: Okay, but we don't do it let's go find someone sometimes we just get so busy doing stuff we forget to stop pause and put herself through this kind of process.

320

00:49:31.770 --> 00:49:43.980

Stephanie Bogan: Where we can sometimes pretty quickly just get to the issue and move forward bring that kind of process to your mastermind or bring it here and hopefully that'll again this helps give you guys a model for going through that when you're sitting in your office like what's going on here.

321

00:49:45.480 --> 00:49:47.070

Stephanie Bogan: tanya anything else you want to add for trends.

322

00:49:48.240 --> 00:49:54.450

Tanya Nichols: While this will be for the group, because I know there's a lot of I'm a recovering perfectionist I would say a lot of us out there.

323

00:49:54.930 --> 00:50:07.740

Tanya Nichols: And that story is serve it serves us somehow for a period of time, and then I just I heard you talk about that, through a couple of the different things, the delegation piece, as well as deciding where to start.

324

00:50:08.280 --> 00:50:19.920

Tanya Nichols: And I wonder if there might be some if it would be worthwhile to spend energy on reframing that story somehow like because sometimes we we we it's like almost an excuse.

325

00:50:20.580 --> 00:50:32.160

Tanya Nichols: For our behavior when in fact it has served us really well to get us to where we're at, but the same



activities aren't necessarily going to serve us into getting where we need to go, so what you need to work on is delegation, for example.

326

00:50:32.700 --> 00:50:40.770

Tanya Nichols: Well, just letting your brilliant staff take over projects and then maybe they come to you with with how they think they should do it.

327

00:50:41.160 --> 00:50:44.970

Tanya Nichols: You tell them there's this problem to solve Can you help me solve this problem.

328

00:50:45.720 --> 00:50:52.470

Tanya Nichols: And then have it be on them to bring it back to you, I have found that to be a really effective way to delegate because I have the same.

329

00:50:52.770 --> 00:51:02.130

Tanya Nichols: You know, somewhat controlling tendencies, I can do it better, I can do it faster I don't know how to explain it so, then I just I explained the problem and then ask them to solve it, and it is amazing to see what.

330

00:51:02.490 --> 00:51:07.170

Tanya Nichols: The talented people that we we have can it's amazing to see what they can do when we let them.

331

00:51:08.400 --> 00:51:09.810

Tanya Nichols: So the perfectionist thing was my.

332

00:51:09.810 --> 00:51:13.800

Tanya Nichols: takeaway was to write out how that serving you and then.

333

00:51:15.570 --> 00:51:18.180

Tanya Nichols: reframing the perfection story.

334

00:51:18.660 --> 00:51:30.120

Stephanie Bogan: So, each time you go through that i'll put a just a slightly finer point on that is you've heard me say many times right what time is really talking about is in the CERT it's in the service of what like in the past, it was in the service of.

335

00:51:31.050 --> 00:51:43.440

Stephanie Bogan: You know, someone on the earlier call was like literally she's like and we went right through and she was like blah blah blah blah blah and I if I you know I made my career and doing everything myself blah blah blah like whoa stop the presses.

336

00:51:44.010 --> 00:51:56.820



Stephanie Bogan: Like that's the kind of stuff that's in there that and that's what that perfectionist and control is about is, we all have ice like if there if there were a metal as a podium Stan i'd be on the i'd be on the goal they'd be a platinum for me.

337

00:51:57.450 --> 00:52:05.700

Stephanie Bogan: Like that perfectionism is our it's a mechanism control strategy and it's if I guarantee a certain outcome, I will avoid.

338

00:52:06.210 --> 00:52:21.780

Stephanie Bogan: A certain response and uncomfortable unpleasant one and that always has an origin and we don't have to you know you don't even have to get into the Virgin to know that's a problem and that's that's what we ultimately want to unstuck is it's in the service of keeping things perfect.

339

00:52:23.010 --> 00:52:28.110

Stephanie Bogan: But it's at the cost of progress joy satisfaction revenue growth and.

340

00:52:28.560 --> 00:52:40.230

Stephanie Bogan: Again it's in that moment, where, when you delegate where you're like I look at I delegated ton and not everything gets like that's not the point like you have to reframe the story away from perfect, as the standard.

341

00:52:40.920 --> 00:52:47.760

Stephanie Bogan: One of the things I tell my kids a lot and I tell my kids this or the team this all the time, is it doesn't have to be perfect, to be good.

342

00:52:49.200 --> 00:53:03.540

Stephanie Bogan: So we need you need to find that way to reframe the story, and you know, in the service of at the cost of is a good way to help and when you're in that moment use that to be like oh wait, this is the cost of right for tanya it was braces time for you it's something else.

343

00:53:05.280 --> 00:53:16.770

Stephanie Bogan: So get clear on your niche and then get clear on the delegation piece, and if you don't see meaningful progress by your next pod meeting, let us know your pod, let us know.

344

00:53:17.490 --> 00:53:19.860

Trent Porter: Thank you so much you're welcome thanks term.

345

00:53:20.400 --> 00:53:22.980

Tanya Nichols: We should have got gone galson you let us go on to one.

346

00:53:23.040 --> 00:53:24.000

Tanya Nichols: Oh sorry.



347

00:53:25.080 --> 00:53:26.250

Limitless Adviser: I know it was good stuff.

348

00:53:29.040 --> 00:53:29.550

Stephanie Bogan: alright.

349

00:53:31.170 --> 00:53:34.260

Stephanie Bogan: Are we have let's see who is next on the list here.

350

00:53:37.380 --> 00:53:43.380

Stephanie Bogan: Nathan you're on you have something you want to add on the niche front or did we cover it in the last niche conversation.

351

00:53:43.710 --> 00:53:51.300

Nathan Holt: um I think i'm good i'm going through my first quarter of surges right now, which has been awesome.

352

00:53:52.680 --> 00:53:54.990

Nathan Holt: So my goal in May is to.

353

00:53:56.070 --> 00:53:57.660

Nathan Holt: pick a target and go.

354

00:53:58.770 --> 00:54:02.040

Nathan Holt: So i'm looking forward to that the one thing that did pop up.

355

00:54:03.390 --> 00:54:06.060

Nathan Holt: The mastermind pod I have no idea what that is.

356

00:54:06.810 --> 00:54:15.750

Stephanie Bogan: Oh i'm sorry the the life's the lifestyle Members are in mastermind and I forget, so you guys can do that on tribe so we've got those accountability groups in tribe.

357

00:54:16.170 --> 00:54:23.580

Stephanie Bogan: And so we want, like you, we will, if you can go in there and be like hey i'm doing an accountability post right, I will do it by this date.

358

00:54:24.270 --> 00:54:33.660

Stephanie Bogan: So we'll make sure you guys get the information all if you want, I can have in the next inbox insight, we can put a link in that for it for you guys, but it should be there, I think it's the accountability room.



359

00:54:35.970 --> 00:54:36.690

Nathan Holt: Okay, great.

360

00:54:36.900 --> 00:54:37.290

Stephanie Bogan: night.

361

00:54:37.500 --> 00:54:42.000

Stephanie Bogan: I might be one week ahead of amy and the tech team, if that is the case, because for me.

362

00:54:43.500 --> 00:54:46.920

Stephanie Bogan: I have ideas they timeline them and then I try to remember when they're launching.

363

00:54:48.600 --> 00:54:52.470

Stephanie Bogan: Alright alright, so do you feel like you have kind of good direction on the niche side.

364

00:54:52.950 --> 00:54:53.970

Nathan Holt: yeah i'm good.

365

00:54:54.270 --> 00:54:54.990

Okay, great.

366

00:54:56.130 --> 00:54:58.470

Stephanie Bogan: All right, Brian question around fees.

367

00:55:01.590 --> 00:55:13.680

Brian Blankenburg: Yes, mine so i'm going to be new start to advisor and trying to figure out with my niche which is going to be in real estate.

368

00:55:14.340 --> 00:55:24.390

Brian Blankenburg: Helping folks that are not currently investing in real estate that are primarily invested in the markets, get into real estate as part of their overall incoming growth and wealth growth.

369

00:55:25.020 --> 00:55:32.790

Brian Blankenburg: So in that world obviously there's going to be assets that are coming out of their investable assets and will need to.

370

00:55:33.930 --> 00:55:53.580

Brian Blankenburg: I would like to find a way to charge for that, and of course there's compliance I don't know whether i'm going to ra or bd at this point so in terms of clients not sure which route to go there, but i'm thinking so far i'm thinking it's either going to be a fee based off of.



371

00:55:54.630 --> 00:56:08.100

Brian Blankenburg: The number of properties that are inside the their assets or the fee based off of the value of their equity in the property, so the amount of money that they have in those properties.

372

00:56:10.170 --> 00:56:13.020

Stephanie Bogan: So almost like based on network or a combination of.

373

00:56:13.080 --> 00:56:19.590

Brian Blankenburg: Other assets and network, a ua or like a like I said Center this trace route buys me kind of model.

374

00:56:20.010 --> 00:56:28.950

Stephanie Bogan: yep well I could just add a practical level, tell you that you'll have a lot more you'll have a lot more latitude on the RSI does events, then you will, on the B2B side of the fence for sure.

375

00:56:29.730 --> 00:56:39.360

Stephanie Bogan: And again, that will vary depending on depending on the broker dealer rights larger, more sophisticated ones will tend to be better smaller ones tend to be a little bit harder on that.

376

00:56:41.100 --> 00:56:47.970

Brian Blankenburg: DVD side it'll probably be lpl because I have a friend, that will kind of let me kind of come underneath them, if you will.

377

00:56:48.630 --> 00:56:58.290

Brian Blankenburg: which will give me a lot of good economy of scale, the problem, the biggest problem I have with the ra side is just the complexity and the fees going out on my own and.

378

00:56:59.220 --> 00:57:08.850

Brian Blankenburg: The fees would be significantly more the cost to be significantly more in the short run, because there's so many more fixed costs from what i've noticed, but maybe that's wrong I don't know.

379

00:57:10.140 --> 00:57:14.640

Stephanie Bogan: That may be for your for your current as maybe for your current asset size.

380

00:57:15.060 --> 00:57:15.510

Stephanie Bogan: Right well.

381

00:57:16.410 --> 00:57:22.500

Brian Blankenburg: Anyway, it'll be zero So hopefully some clients will come with me, but it affected zero.

382



00:57:23.070 --> 00:57:30.810

Stephanie Bogan: yeah and what you want to figure out is what is the what is the the revenue point at which that shifts right When does it make sense, because if that's it like.

383

00:57:31.110 --> 00:57:37.740

Stephanie Bogan: Again, you don't yet know what your projected growth rate is, but you can project something reasonable based on you know goals and averages.

384

00:57:38.040 --> 00:57:47.100

Stephanie Bogan: And if you're going to need to change again, and you know 24 months, then that might tell you to the ERA side and if you're like hey it's five or six years and i've got LP as far as bd goes.

385

00:57:47.580 --> 00:57:53.430

Stephanie Bogan: There big they have strong I mean that you know they've they've got you know, there is advanced as far as tracking systems go so.

386

00:57:53.790 --> 00:58:02.700

Stephanie Bogan: You know if you can wrap up and that works for you, economics and what you're really looking right now is a by versus build costs it's no different than when i'm doing like big m&a stuff is.

387

00:58:03.000 --> 00:58:14.160

Stephanie Bogan: If you go to lpl you're basically buying it and that's a cost and a timeframe and it's how you're going to use your energy and your resources, and if you go on your own it's a cost and a timeframe and how you're going to use your energy and resources.

388

00:58:14.640 --> 00:58:20.880

Stephanie Bogan: And if you have specific questions around that tanya would be a great person to talk to you because she's just gone through all of that um.

389

00:58:22.080 --> 00:58:22.260

Stephanie Bogan: yeah.

390

00:58:22.290 --> 00:58:35.250

Tanya Nichols: She just fill out the I know all about the cost Mike actually in the chat shared an interesting resource I don't I don't know I do old fashioned a UN that ain't perfect, but none of them are right.

391

00:58:35.730 --> 00:58:46.800

Tanya Nichols: And so, Brian said refill or excuse me Mike said refocus financial planning firm and within X pn but his be model is similar and listed on his website, I guess.

392

00:58:47.910 --> 00:58:57.690

Brian Blankenburg: y'all look at the focus one, and then I actually was supposed to be on a call with X, Y PM at one o'clock today, but my other meeting ran over so I missed it so.



393

00:58:59.310 --> 00:59:03.450

Brian Blankenburg: But I do have a planned video conference with him at some point.

394

00:59:04.230 --> 00:59:13.740

Stephanie Bogan: yeah and I haven't seen Mike Thank you very much for that Chair will check it out as well allison note it, but I suspect it's a combination of either all fixed or fixed and a US.

395

00:59:14.250 --> 00:59:30.420

Stephanie Bogan: Based on network portfolio in your case right equity in the portfolio, but you're typically going to want to separate the the UN fee from the balance i've had clients do it on the network portfolio i've hadn't do it on it, you know income so.

396

00:59:31.200 --> 00:59:38.700

Stephanie Bogan: You know, we can talk about the specifics, but if you what you ultimately want to do is figure out what your your goal target revenue per client is.

397

00:59:39.540 --> 00:59:49.200

Stephanie Bogan: And then you know, in general, what are the allocations, going to be and then what's the fee you're going to charge on assets which is pretty straightforward and particularly for your client type in model I would keep.

398

00:59:49.680 --> 00:59:57.270

Stephanie Bogan: If you don't just do a flat fee, if you do any kind of building on assets, I would keep that really simple right on under a million over a million.

399

00:59:57.690 --> 01:00:07.140

Stephanie Bogan: Over 3 million, or something along those lines, because that's we talked about this on tribe right it's just that's not kind of where they're going to be as focused, so we want to keep that as simple as possible.

400

01:00:08.340 --> 01:00:15.060

Stephanie Bogan: So if you pick that flat fee variable plus the assets under management piece that you're going to want that to get you to the target.

401

01:00:15.450 --> 01:00:22.320

Stephanie Bogan: Revenue based on kind of the the average client size that you think they are getting to in terms of what specific numbers that you pick.

402

01:00:23.130 --> 01:00:33.870

Stephanie Bogan: But if we can pick the model that's best for you like, do you like the idea of doing it based on assets and a percentage of the equity in the portfolio, or what about their overall network.

403



01:00:35.190 --> 01:00:42.900

Brian Blankenburg: I do they always the guy I hesitated on the overall network, because I didn't want to include their primary residence i'm not really advising on that.

404

01:00:44.040 --> 01:00:48.780

Brian Blankenburg: I wanted it to be based off of what i'm actually helping them to grow their.

405

01:00:49.920 --> 01:00:54.960

Brian Blankenburg: assets with like they're usable assets and I don't work at the houses and usable asset.

406

01:00:55.260 --> 01:01:02.370

Stephanie Bogan: So what if they take a half a million dollar \$200,000 and they invested in business to private business.

407

01:01:03.390 --> 01:01:03.570

Stephanie Bogan: I would.

408

01:01:03.660 --> 01:01:08.850

Brian Blankenburg: Say it's probably the same thing I would look at it, similarly, in terms of assets under advisement.

409

01:01:10.320 --> 01:01:18.000

Brian Blankenburg: If it's something that so under the model that i'm still building out on a property, I am going to be, including that in my.

410

01:01:18.450 --> 01:01:28.470

Brian Blankenburg: annual reviews looking at numbers talking with their other professional network within the real estate world combining all of that into their financial plan I don't know about.

411

01:01:28.980 --> 01:01:38.790

Brian Blankenburg: The business case whether I would do the same thing and say hey let's go over your business and make sure you're hitting the numbers like a mock CFO for them for that, so I do see that there is a difference for me.

412

01:01:39.480 --> 01:01:39.780

Okay.

413

01:01:41.970 --> 01:01:42.390

Stephanie Bogan: All right.

414

01:01:44.880 --> 01:01:56.010

Stephanie Bogan: So I you and I can talk there's there's a lot of questions that I want to ask you to drive into what bottle is going to be right for them, but I want you to if you do the assets under advisement like what's the target fee



that you're getting to.

415

01:01:58.410 --> 01:02:02.160

Stephanie Bogan: Get like what's your minimum, and you know your target client yeah.

416

01:02:02.250 --> 01:02:05.880

Brian Blankenburg: So my minimums going to be \$5,000 a year okay.

417

01:02:09.960 --> 01:02:16.230

Brian Blankenburg: terms of so how that breaks down I don't know in terms of a UN versus outside.

418

01:02:17.250 --> 01:02:21.780

Brian Blankenburg: Because I haven't figured out how i'm going to charge an outside, yet I don't know i'm thinking that for.

419

01:02:22.290 --> 01:02:35.940

Brian Blankenburg: I would think that at least 20 \$500 would be an ongoing some sort of retainer for a property and if they if they can't pay me that 20 \$500 a year, then, then that probably doesn't make sense that i'm advising on it's too small.

420

01:02:36.450 --> 01:02:43.710

Stephanie Bogan: yeah I mean there's going to be a certain way you're good, we want to look at is what is the portfolio value if you're using a percentage of equity rate is it.

421

01:02:43.800 --> 01:02:49.650

Stephanie Bogan: You know if you're looking at 20% down, you know, like what's the model client there is it someone that really has sort of.

422

01:02:50.070 --> 01:02:55.560

Stephanie Bogan: You know that has you know liabilities on those properties are their cash, you know, is it earlier in their career.

423

01:02:56.250 --> 01:03:02.070

Stephanie Bogan: But, in general, what you're going to want to make sure of is that you're getting to that \$5,000 number kind of, no matter how you get there.

424

01:03:02.430 --> 01:03:12.900

Stephanie Bogan: So the reason that I asked the question about if they you know invest not in real estate or the business is because there will be things that are sort of off those two tracks so that's where the asset under advisement fee.

425



01:03:13.290 --> 01:03:21.360

Stephanie Bogan: would probably be a good model and then you're going to want to look at you know, is it 50 basis points is at 25 you know it's not going to be 125 basis points on all of those.

426

01:03:21.750 --> 01:03:30.000

Stephanie Bogan: And then I would just set that minimum and then I would do the same thing on and we can look at the model, because I think you know you want to follow the success clues if someone's doing it.

427

01:03:30.450 --> 01:03:47.520

Stephanie Bogan: And then set the minimum on the on the sorry on the investment side and then what you have to figure out is if they don't like their backup here you're not going to have a minimum on the investment side I assume you're just going to have a minimum on the overall fee right.

428

01:03:47.610 --> 01:03:55.650

Brian Blankenburg: Okay, yes, all right yeah, so I would take somebody that meets the minimum but maybe doesn't have an interest in real estate right away.

429

01:03:57.480 --> 01:04:03.750

Brian Blankenburg: I just don't see myself attracting that person I don't at least right away, I don't see myself turning away that person we were.

430

01:04:04.950 --> 01:04:05.190

Stephanie Bogan: All right.

431

01:04:05.220 --> 01:04:06.060

Tanya Nichols: Well, I think that it.

432

01:04:06.750 --> 01:04:07.320

Stephanie Bogan: Go ahead tanya.

433

01:04:07.380 --> 01:04:15.780

Tanya Nichols: Is stuff that he has some other good resources there and Brian maybe you've already done some of this work and due diligence to find some people who have done it before you but.

434

01:04:16.170 --> 01:04:31.080

Tanya Nichols: I think the the tribe Members here are making a really excellent point somebody else's probably figured it out somewhere and just searching them out, you know sending money to their favorite charity asking for an hour of their time, whatever that can be like super useful so she's.

435

01:04:31.800 --> 01:04:35.940

Brian Blankenburg: Another person so it's good to see these other posts on here, so I appreciate it.



436

01:04:36.180 --> 01:04:46.890

Tanya Nichols: And you could post that on the tribe to and just say hey i'm doing this real estate focus thing, what do you guys think does anybody know anybody, and you know, most of us love to share all the stuff we know about right so.

437

01:04:47.370 --> 01:04:55.590

Stephanie Bogan: And then the thing that I would note, and I think it's really important outside of model fee structure that you choose is noticed in both of those cases they're branded.

438

01:04:56.940 --> 01:05:02.670

Stephanie Bogan: And so you made the point like I would take someone who, and I understand that you're in the starter phase, but the more the more.

439

01:05:03.090 --> 01:05:07.260

Stephanie Bogan: Your branding the more specific your branding is the more potent your message will be.

440

01:05:07.800 --> 01:05:14.730

Stephanie Bogan: So you want to make sure that you get really clear on who that niches the fee structure is obviously very important to communicating it.

441

01:05:15.120 --> 01:05:21.000

Stephanie Bogan: and make sure that the brand that you build really attract that audience, because it will make your marketing much more effective.

442

01:05:21.480 --> 01:05:28.950

Stephanie Bogan: And then you want to make sure that you can tell the story, and then you have a fee structure, so I think time is right, if I didn't see all those chats there's there people who've done it.

443

01:05:29.340 --> 01:05:42.060

Stephanie Bogan: Do that due diligence should share on tribe like let me know what you know what you find out and then let's just go through that and figure out what the right fee structure is because the good news is you are, you know you can evolve it over time.

444

01:05:43.320 --> 01:05:51.540

Stephanie Bogan: It really is at some point pick something and go and I promise you, Brian that the fee structure, you have right now will not be the fee structure, you have in five years.

445

01:05:52.290 --> 01:05:54.120

Stephanie Bogan: Unless we just get really lucky.

446

01:05:54.600 --> 01:06:02.520

Stephanie Bogan: But I know so know that if you start and you get your practice on a few people and you go through



that process, you can always adjust it for new clients and.

447

01:06:02.760 --> 01:06:10.530

Stephanie Bogan: Because you don't have a big base of clients it's not hard to sort of backdate you know any changes if you make a change six or 12 months from now.

448

01:06:11.940 --> 01:06:14.250

Stephanie Bogan: I know, with one of our Members I don't know if GABE or.

449

01:06:14.970 --> 01:06:24.450

Stephanie Bogan: peyton was on we had some calls at one point I think it was last year because they were just trying that model with the prospects like I tried this fee structure, this is what the response was how did it work.

450

01:06:24.900 --> 01:06:29.700

Stephanie Bogan: And that was where we ultimately got to the fee structure that really worked for that audience.

451

01:06:30.960 --> 01:06:32.730

Tanya Nichols: So we try to get one more in stuff.

452

01:06:32.970 --> 01:06:33.630

Stephanie Bogan: yeah let's do it.

453

01:06:33.810 --> 01:06:41.820

Tanya Nichols: And then, Brian keep checking out the chat that he's got some awesome resources there and even offered an intro to a cool real estate study group.

454

01:06:42.210 --> 01:06:42.480

Okay.

455

01:06:44.940 --> 01:06:57.450

Tanya Nichols: that's really where the magic happens, by the way, is the connection between all of us like today, even i've got people who were here in your one that maybe aren't here anymore are still here and we still are hashing this stuff out together.

456

01:06:57.990 --> 01:07:02.160

Stephanie Bogan: it's pretty cool it's the power of tribe all right, who is next.

457

01:07:02.760 --> 01:07:06.480

Limitless Adviser: Mike had a question i'm getting comfortable running the say yes meeting.

458



01:07:07.140 --> 01:07:07.650

Stephanie Bogan: All right, Mike.

459

01:07:09.600 --> 01:07:10.320

Mike Metzger: yeah.

460

01:07:11.400 --> 01:07:17.790

Mike Metzger: i've been listening to you guys and all the coaches on podcast before this even started, and so I got a bit of a head start.

461

01:07:18.330 --> 01:07:25.770

Mike Metzger: On my niche and running search meetings and trying to run my business more efficiently and i've got it there.

462

01:07:26.760 --> 01:07:35.070

Mike Metzger: I tend to live in my head a lot and I focus on certain projects and then I complete that project, but I tend to avoid the things that I struggle with the most.

463

01:07:35.820 --> 01:07:51.990

Mike Metzger: And what that is really is the communication inside of meetings it's like i've got this really great message in my head and then, when it comes to actually verbalizing it like I have no idea what i'm saying you know I get lost and.

464

01:07:53.700 --> 01:07:58.890

Mike Metzger: I struggle with that i've tried practicing it, but you can't really practice a live conversation, you know and so.

465

01:08:00.060 --> 01:08:05.220

Mike Metzger: I guess it would i'm trying to work on conducting better meaning stuff flow better.

466

01:08:05.700 --> 01:08:17.340

Stephanie Bogan: Okay, where is it not flowing the way that you want, aside from like, how is it showing up for you and how might it be showing up for it like for them in the meeting, to the extent you can assess that.

467

01:08:18.690 --> 01:08:20.730

Mike Metzger: yeah I think the meetings in general.

468

01:08:21.780 --> 01:08:34.710

Mike Metzger: run pretty well and it could be just me being my own worst critic I have a write out my process on a yellow pad right and so i've got this order of things, of the way I wanted to flow.

469



01:08:35.460 --> 01:08:46.050

Mike Metzger: But the second it starts deviating from this organized path that I had my head I just start to get lost and feels like the wheels are falling off okay.

470

01:08:46.680 --> 01:08:47.760

Stephanie Bogan: Can you give me an example.

471

01:08:51.240 --> 01:08:53.490

Mike Metzger: yeah I just recently had.

472

01:08:54.600 --> 01:09:03.720

Mike Metzger: The good thing is the message has been that i've gotten out through through the story's been getting out there, so i've had a lot more meetings and the practices, helping but, like in the last meeting I just had.

473

01:09:04.950 --> 01:09:11.430

Mike Metzger: I intended it to be only be about 45 minutes, there was a lot of questions, I was surprised at the.

474

01:09:12.090 --> 01:09:22.560

Mike Metzger: Lack of information that they knew about their own finances and so because they didn't really know the answers to some of those questions that I was having I was struggling pulling that meeting forward.

475

01:09:24.900 --> 01:09:30.960

Mike Metzger: And then I just sort of I just sort of get lost in it just the the meeting i'm not controlling the meeting the meeting is kind of controlling me.

476

01:09:33.780 --> 01:09:36.270

Stephanie Bogan: Right tiny I see you nodding, do you want to start on this one.

477

01:09:37.440 --> 01:09:38.640

Tanya Nichols: No, you go okay.

478

01:09:39.240 --> 01:09:47.490

Stephanie Bogan: All right, so what's happening, I think, to an extent as you pointed out, which is you're getting in your head, so we had this idea of a model and I Chris.

479

01:09:47.880 --> 01:09:53.670

Stephanie Bogan: You know, we started with Chris and one of our calls couple weeks ago, and you know, to an extent we're looking for.

480

01:09:54.180 --> 01:10:00.870

Stephanie Bogan: That prescribed path like i'm going to do these things in this prescribed order and everything's



going to come out Okay, and, in general, it will.

481

01:10:01.260 --> 01:10:09.480

Stephanie Bogan: But as you notice in those client meetings that's not always the way that it works, and so I want you to think of those meetings as stepping stones on a pond.

482

01:10:10.110 --> 01:10:20.010

Stephanie Bogan: but not necessarily in a straight line so there's two pieces here one is you're trying to guide the client through a conversation that gets you the information you need.

483

01:10:20.430 --> 01:10:29.640

Stephanie Bogan: To create the one page plan and the second meeting and add value through the process you're also trying to do it in the conch within the confines of time.

484

01:10:30.300 --> 01:10:40.800

Stephanie Bogan: So there's two pieces here client management great engagement and advice and the other is very simply tasking maintenance, I have 60 or 75 minutes for this meeting, whatever it is.

485

01:10:41.190 --> 01:10:47.280

Stephanie Bogan: And my job is to make sure we touch all of these bases and get the information we need, so that in that time we can move forward.

486

01:10:47.910 --> 01:10:56.430

Stephanie Bogan: So one task and maintenance is practice tanya will tell you clients do not have you know they don't look at the agenda go oh wait i'm going to wait to the end of the meeting for that.

487

01:10:56.820 --> 01:11:04.200

Stephanie Bogan: So there's pieces where you're going to learn to manage meetings and this might be different than your example, but I think it applies to everyone, which is.

488

01:11:04.590 --> 01:11:11.910

Stephanie Bogan: You ask a question and you end up going off on a tangent and you can literally that tangent can go on for a long time, and you didn't even get to the question.

489

01:11:12.570 --> 01:11:22.710

Stephanie Bogan: You want to build guard rails around it and you want to have strategies for doing it, I promise you tanya has you know, probably organically over the years, developed your own but it's.

490

01:11:23.280 --> 01:11:34.440

Stephanie Bogan: wow you know that sounds really important i'm going to make a note of that and when we get to the planning taxes to you know part of the discussion, I want to make sure we have an opportunity teeth Okay, I want to, so what I heard you say was.



491

01:11:34.800 --> 01:11:42.270

Stephanie Bogan: That the issue with your sister and your mother around the state is creating X, Y or Z okay great alright we're going to know that.

492

01:11:43.020 --> 01:11:53.880

Stephanie Bogan: Alright, so moving forward and then you can bring it back so there's this way to capture it and package, it and let them know I hear you but i've got to put this somewhere else in the in the conversation process.

493

01:11:54.300 --> 01:11:59.070

Stephanie Bogan: so that I can keep us on track, think of it as like little detours, you know, like those a.

494

01:11:59.670 --> 01:12:07.650

Stephanie Bogan: Step family stops on the highway where you can kind of the pit stop where you can stop and so that's what you're ultimately wanting to do is bring that conversation back.

495

01:12:08.040 --> 01:12:19.590

Stephanie Bogan: To where you want to bring it back to which is different than part of what I heard, I think you say, which is they don't know something and then obviously that starts a training or education conversation, and I see tonya nodding a lot so.

496

01:12:19.860 --> 01:12:21.150

Tanya Nichols: Okay yeah so.

497

01:12:21.600 --> 01:12:23.070

Tanya Nichols: here's here's what I want to.

498

01:12:23.370 --> 01:12:23.730

Stephanie Bogan: know if.

499

01:12:23.850 --> 01:12:24.630

Stephanie Bogan: there's nothing else.

500

01:12:25.140 --> 01:12:27.030

Tanya Nichols: I have two hour long meetings.

501

01:12:27.090 --> 01:12:36.360

Tanya Nichols: I do, I am like this is something i'm constantly hacking, so I really I don't have Okay, I did have a two hour meeting last week i'm going to be honest, I did.

502

01:12:37.110 --> 01:12:47.220



Tanya Nichols: But this is something i'm really working on this year, but what i'm doing I just shared my screen and in the time that you guys were chatting I was like a kid with my camera Can you see this okay.

503

01:12:48.390 --> 01:12:48.750

Mike Metzger: Yes.

504

01:12:48.960 --> 01:13:01.170

Tanya Nichols: Okay, so I tried to think about like what is the purpose of my I have like you know, a roadmap, if you go to my website aligned financial the client roadmap is on there it explains the purpose of each meeting, just like the say yes.

505

01:13:02.010 --> 01:13:13.530

Tanya Nichols: say yes or whatever, thank you, thank you, so I have to remind myself before I go into each one of these stages what in the heck Am I actually doing.

506

01:13:14.340 --> 01:13:28.740

Tanya Nichols: So, in the first meeting quick call do we want to keep talking that is actually it there's three things I pull up my one note file there's three things I have to make sure I cover are they willing to pay fees are they willing to take advice and.

507

01:13:30.030 --> 01:13:40.200

Tanya Nichols: Do they have enough money Those are the three things I need to figure out what in that short phone call in the second one I just try to learn more about what their story is and, if I can even help them.

508

01:13:40.980 --> 01:13:51.750

Tanya Nichols: The third is how now, it probably got some buying the third is how I think I can help you the fourth talk to Cooper to get your money moved over and then eventually we recap together in the strategy meeting once they become a client.

509

01:13:52.380 --> 01:14:01.650

Tanya Nichols: But I have the same thing that happens, I get really lost in making sure that the process is perfect and then i'm like i'm following all the rules and i'm doing all this stuff and i'm hitting all the points.

510

01:14:03.210 --> 01:14:09.510

Tanya Nichols: And if I get stuck in my head before you know it, I am solving their problem in the first meeting, and we are talking about a three hour meeting.

511

01:14:11.010 --> 01:14:20.520

Tanya Nichols: So I have to really get clear and walk into the meeting with the actual only thing that I need to take away from that first call is, do we even want to have another conversation.

512

01:14:21.240 --> 01:14:23.850

Tanya Nichols: that's actually the purpose of the call it's not to find out.



513

01:14:24.210 --> 01:14:29.190

Tanya Nichols: You know that they they're sad about their mom or anything it's not about that it is just do we want to have another call.

514

01:14:29.400 --> 01:14:36.180

Tanya Nichols: And in that discovery meeting, which is where I get more info which is kinda like what I think you're talking about in that discovery meeting.

515

01:14:36.420 --> 01:14:48.390

Tanya Nichols: it's that one is designed to learn about them and, if I can help them it's not to help them in that meeting it's not to solve and show them how smart I am and how I can solve all of these problems it's actually just a to figure out, if I can help them.

516

01:14:49.230 --> 01:14:52.650

Tanya Nichols: But, not to say that I do not struggle with long meetings, because I certainly do.

517

01:14:54.000 --> 01:15:01.230

Stephanie Bogan: Well, long meetings are a function of helper personalities it's been my experience, because helpers want to.

518

01:15:01.680 --> 01:15:13.110

Stephanie Bogan: Listen explore solve and cover everything like Oh yes, we can do that, and we can do that, and so I think this is a really nice dovetail that will apply to both tanya and Mike and all of you is.

519

01:15:13.500 --> 01:15:23.280

Stephanie Bogan: That engagement track that we talked about is that's tanya's questions that and we'll go through that in the prospect process, but those are very similar right to our, what are the what are you actually doing in each meeting.

520

01:15:23.850 --> 01:15:32.040

Stephanie Bogan: And Mike if you're really clear that in that meeting your job is to write what was your second what was the way that you framed it was really nice.

521

01:15:32.670 --> 01:15:34.800

Tanya Nichols: What is your story and kind of help you.

522

01:15:35.130 --> 01:15:44.220

Stephanie Bogan: What is your story and can I help you that's the beauty of clarity and focus, because now what i'm not doing is i'm not solving in that meeting and that's where that task and maintenance, I talked about.

523

01:15:44.640 --> 01:15:49.680



Stephanie Bogan: integrates with engagement advice, because your job is to be on a on a high alert.

524

01:15:50.070 --> 01:16:00.870

Stephanie Bogan: This is why you go to meetings Presidents why you have the agenda is why you practice the part you do say over and over so that all of that is wrote and routine and you don't spend any energy on it, so that you can show up and listen.

525

01:16:01.380 --> 01:16:18.750

Stephanie Bogan: And when you hear things like that you go oh okay so part of our work together is going to be me helping you being here as a lifelong Problem Solving partner seating seating what I hear you saying that one of those right I tonya that greatly what's on your what's on your mind right.

526

01:16:18.750 --> 01:16:19.020

Stephanie Bogan: Now.

527

01:16:19.050 --> 01:16:19.710

Stephanie Bogan: Your attention.

528

01:16:20.040 --> 01:16:31.440

Stephanie Bogan: What has your attention such a great question right like this is one of those life issues that has your attention right now let's put that i'm going to make a note of that, like look oh look i'm doing that thing I promise Look how trustworthy incredible I am.

529

01:16:31.830 --> 01:16:37.410

Stephanie Bogan: we're going to make a note of that, as we get further into our agenda today we're going to spend some time really talking about.

530

01:16:37.740 --> 01:16:43.080

Stephanie Bogan: What should have your attention long term and what has your what should what has your attention near term.

531

01:16:43.320 --> 01:16:49.680

Stephanie Bogan: So that when we get together in our next meeting, I can take everything that you share with me the goals, the situation what's important to you.

532

01:16:49.950 --> 01:16:58.020

Stephanie Bogan: All are planning expertise, the tax rate blah blah blah, and I can come back to you and tell you what should be on your radar is we live your plan now and into the future.

533

01:16:58.500 --> 01:17:10.050

Stephanie Bogan: So i've just said, I hear you I listen, I understand I didn't in any way stop to open the door of the apartment I just said, oh that's condo three be I like three be we're going to put it on the map.



534

01:17:10.380 --> 01:17:19.680

Stephanie Bogan: we're going to put it on the tour so that's what I want you all to think about is talking it through is different than putting it on the tour so in those moments Mike ask yourself.

535

01:17:20.190 --> 01:17:23.280

Stephanie Bogan: Is it appropriate to talk it through or do I put it on the tour.

536

01:17:24.180 --> 01:17:32.940

Stephanie Bogan: And then task and maintenance is know how you're going to how you're going to script that oh great let's let's let's put this on the agenda here in our next meeting will.

537

01:17:33.630 --> 01:17:42.060

Stephanie Bogan: Because what you want to share to tanya's point is not solving it, but how you will solve it in the future because that's the value they're going to be paying for.

538

01:17:42.510 --> 01:17:53.040

Stephanie Bogan: hey as we work together in the future, this is the kind of thing that we're going to be addressing on an ongoing basis, some of them like this, we know now, some of them are going to come up as we go right now we know this.

539

01:17:53.250 --> 01:17:59.460

Stephanie Bogan: So this is how the process will work right we're going to get together we're going to do in the future, like you can constantly.

540

01:17:59.820 --> 01:18:12.450

Stephanie Bogan: And that's the stuff you can't script that's the why you script and routine as much as the factory work even expert factory work is we're now calling it expert systems like a lot of the thoughts stuff can become factory work.

541

01:18:13.020 --> 01:18:22.470

Stephanie Bogan: And then that leaves you to truly be in that meeting, you have a history that builds up in the second meeting you know what they did in the first meeting and, over time, you just become really.

542

01:18:23.040 --> 01:18:32.970

Stephanie Bogan: You hone your craft of navigating those conversations, so you know how to gracefully nip and tuck and guide and you know when something is so critical that you're going to stop.

543

01:18:33.480 --> 01:18:41.940

Stephanie Bogan: And you're going to because if you get that right, everything else is done but it's a judgment call it's its discernment and it's practice, like the only way to get that MIC.

544

01:18:42.570 --> 01:18:54.330



Stephanie Bogan: Is practice so step one is creating awareness around it, oh i've got my agenda, I can flow through that but i've got to make sure i'm putting guardrails to those conversations and keeping them.

545

01:18:54.720 --> 01:19:01.080

Stephanie Bogan: In that past so i'm i'm helping i'm not i've you know i'm telling them how i'm going to help i'm not going to help directly.

546

01:19:03.240 --> 01:19:09.540

Mike Metzger: yeah that's helpful and I think just do that conversation I realized that just like tania tania I.

547

01:19:09.960 --> 01:19:22.230

Mike Metzger: I start trying to solve, so if they don't know that particular financial piece of information I start telling them why would be helpful, because we can do xyz once I have that that information, and I think I also realized.

548

01:19:22.770 --> 01:19:27.900

Mike Metzger: The reason why I do that as i'm I still feel like I need to sell them on what I can provide thing.

549

01:19:28.230 --> 01:19:29.700

Tanya Nichols: yeah we're proving all the time.

550

01:19:30.630 --> 01:19:31.050

Mike Metzger: yeah so.

551

01:19:31.110 --> 01:19:42.300

Stephanie Bogan: that's the that's the underlying issue is rate if you're going to get in your head because there's a story otherwise you're going to be 100% present to the client and our job my job as a coach your job as an advisor.

552

01:19:42.840 --> 01:19:52.260

Stephanie Bogan: The hardest work you do is to set your stories down going into meetings and interactions so that the only agenda is you're listening and advice.

553

01:19:53.100 --> 01:19:58.200

Stephanie Bogan: If you're worried about are they going to like me, are they going to listen to me, are they going to you know pay me my fee.

554

01:19:58.740 --> 01:20:02.940

Stephanie Bogan: Then you're in your head and you're not present to the conversation so watch that proving.

555

01:20:03.750 --> 01:20:13.980

Stephanie Bogan: And if you find that that's an ongoing issue, let me know, because then we want to solve for that, but we're always going to try and start with the strategy and the habit and then, if that doesn't work then we'll then



we'll do the different work if we need to.

556

01:20:15.180 --> 01:20:15.840

Mike Metzger: Really, thank you.

557

01:20:16.230 --> 01:20:28.920

Stephanie Bogan: you're very welcome all right all right, I am now I have 70 more dollars to savvy ladies i'm on a roll today i'm 120 I think i'm now 100 201,000 \$270 into savvy ladies.

558

01:20:29.430 --> 01:20:39.510

Stephanie Bogan: So i'm working on my productivity, I you know we're doing a lot right now we have new people starting i'm in Costa Rica and I was like okay i've got to really make sure that timeliness is a thing.

559

01:20:39.900 --> 01:20:45.540

Stephanie Bogan: And I love talking to people, so if i've got the extra 15 minutes i'll do it, but you'll have schedules, I need to respect that so.

560

01:20:46.740 --> 01:21:02.280

Stephanie Bogan: Every 10 Minutes that i'm every minute that i'm late, I contribute \$10 to savvy ladies as part of my just creating consciousness around my time i'm obviously making some very important choices about serving you all, please and savvy lady the money if the extra minutes helped you oh.

561

01:21:03.660 --> 01:21:06.690

Stephanie Bogan: There we go all right on that note i'm sorry.

562

01:21:07.050 --> 01:21:09.360

Tanya Nichols: I just said this was fun thanks everyone for being here.

563

01:21:10.410 --> 01:21:15.480

Stephanie Bogan: Alright, thanks for everyone was this helpful today to kind of go through the the unsticking process together.

564

01:21:17.010 --> 01:21:24.690

Stephanie Bogan: All right, and for those of you who weren't live was watching and engaging was that helpful just to kind of apply it to your situation as you went through.

565

01:21:26.220 --> 01:21:29.340

Stephanie Bogan: Alright, so is anyone still stuck on something.

566

01:21:30.960 --> 01:21:32.640

Stephanie Bogan: That everyone gets some unsticking.



567

01:21:34.860 --> 01:21:40.080

Stephanie Bogan: Right so christy go ahead and drop a chat on tribe if you're unstuck and we'll make sure that we get you some support there.

568

01:21:40.890 --> 01:21:44.160

Stephanie Bogan: anyone else if you've got anything drop it on tribe, I will be on the lookout.

569

01:21:44.640 --> 01:21:52.050

Stephanie Bogan: go into that accountability room, if you want to create accountability with each other, that will be I believe in the next inbox insight so be on the lookout for that as well.

570

01:21:52.710 --> 01:21:58.950

Stephanie Bogan: Right you guys have a great day, and next week, I will be coming to you as you can see i'm in Costa Rica it's my last week here in April.

571

01:21:59.520 --> 01:22:11.400

Stephanie Bogan: I will be coming to you from park city next week and I was just told to expect a foot of snow tomorrow, so it will be less tropical and sunny next week, but until then I will talk to you on tribe you guys have a great day.

