Business Black Ops™ Monthly
Mission & Intelligence Briefing

Special Report and Battle Plan:

Preparing For And Achieving Success In 2021 and Beyond

An Actionable Review of
Meta Level, Strategic Level, and Tactical Level Force Multipliers That Work

Ideas and Information To Make Sure That You and Your Business/Practice Thrive And Improve Every Day, Month and Year™

INTRODUCTION & EXECUTIVE SUMMARY

This report is based on two high level Business Black Ops group coaching calls designed to help members to prepare, in advance, for a new year.

This report will examine three levels of powerful force multipliers to help you prepare for success in the coming year.

They are:

1) Meta-level Force Multipliers (tools for a radically improved and consistently improving mindset)

2) Strategic Level Force Multipliers (strategies that help you to make better decisions about how to use and optimize your tactics, resources and actions, and

3) Tactical Force Multipliers (where we 80/20 the actions you take to optimize your results throughout the next year and beyond)

Summary of Part One – Meta- Level Force Multipliers

Mindset, Clarity, Alignment and Resiliency

First, we will be working at the meta-level mindset force multipliers. When you have and keep a high-level mindset, you're going to make way better decisions about the strategic and tactical things.

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With these tools, you're going to experience way greater resiliency. So that even as you face the inevitable challenges, you will have the ability to recover and to respond more quickly and effectively. And that, in any business sector is a major advantage over the competition.

To help you with optimizing mindset and resiliency, we have developed a series of exercises designed to get you thinking.

Clarity of Purpose, Values, and Mission:

After those exercises, we will get you to clarify and really understand, at a deep level, your purpose, your values and mission in both your personal life and in your business/profession.

What are each of those vital answers?

Purpose - why we (or the business) exist and what we want to accomplish, through time and in any given moment.

Values – these are the values that drive you (or your business) and that you don't want to violate, that you want to optimize.

Mission – this is clearly articulated and has measurable goals. It is specifically, what business results we're trying to achieve (or more) over a specific period of time (or sooner).

So your first assignment is clarifying and documenting your purpose, value and mission.

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Why?

Alignment with Purpose, Values, and Mission

Because, it's one thing to think about these things in our head and in the abstract. It's quite another to write them down, to document them and to get everybody involved and aligned with them. Just as importantly, when we have that level of clarity, then we can work toward ALIGNMENT with purpose, values and mission. When we're aligned, we eliminate friction and things get done more efficiently and effectively.

For example, we can make sure that we have clarity of the purpose, values, and mission, then we can clarify and align the avatar(s) that we're selling to or that we have as our prospect. Then we can also make sure that the things we're selling that avatar are in alignment with your purpose, value and mission as well as the avatar(s) needs.

Summary of Part Two – The Most Important Strategies To Consistently Get More Of The Right Things Done

The ability to say no and to stay focused on the right things

So are your marketing assets and sales processes also in alignment with your clearly articulated and documented purpose, values and mission? If we don't have clarity, then we can't check alignment.

It also makes it easier, by the way, to say "No." to things that we should.

And that's a separate skill set. Saying no is essential to making sure that we're doing more of the things that matter, more of the right things, and fewer of the things that are distractions and take us away from our goals and get us out of alignment with what we're trying to do.

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Using the 80/20 Rule in multiple ways

In this report, we're also going to talk about a little bit and revisit the 80/20 rule as a strategic tool to apply to discipline ourselves to do more of what matters and to say no to the right things. We're going to talk a little bit about this idea in a rapidly changing environment.

Making small bets and A/B testing in a rapidly changing world

We are also going to be talking about making lots of "small bets" and A/B testing new ideas. Here's the thing. Because of COVID (and the idea of these rolling shutdowns) and what our clients, our customers, our patients are going to be able to do, what they're going to want to do safely, and because the business environment is changing so quickly, we need to be more agile than we did before.

We need to test little things to see if they're going to work before we roll them out and spend a lot of time and money and energy and resources on them. So we're going to talk about that in this report.

Balancing Simplicity and Complexity of Systems and Business Models

We're going to talk about the delicate balance or need to balance complexity versus simplicity.

It kind of depends on where you are on the trajectory of growth and longevity. You're going to be looking at this and doing things in a different way in terms of complexity or simplicity if you're a year or two into opening your practice or building your business, versus you're 10 or 15 years in.

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Using SWOT Analysis to achieve more and to protect your business

We're going to talk a little bit about SWOT analysis, doing more of what's working and what's not and doing less of what's not working. SWOT analysis helps us to know and to see threats and opportunities.

Summary of Part Three – Tactical Actions

So that's the summary agenda for part one Meta Level Force Multipliers, and two Strategic Force Multipliers. Part three will be on the tactical things to do. It's where the rubber meets the road.

There are millions of actions that you might take. But here, we have done an 80/20 analysis for you. We have determined a few of the most vital actions that, when taken, will fuel improvement of almost any business or professional practice. What follows is a summary of what we'll examine in detail.

Advanced Planning and Implementation of a Management, Marketing/Content, and Training Calendar

So we're going to talk specifically about setting up management, marketing/content, and training calendars, so that we know what products or service bundles we have in development, where are we on testing pricing, when are we going to launch them, what other promotions are we going to run? What content, ads or sales will we run to support sales? What events might we add or host to promote sales and marketing?

Once we have a plan we can block the time and assign specific actions and follow up through-out the year.

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Editorially, when are we going to create content or run ad campaigns? When are we going to take the time to go back and check them and see how they did? What platforms will we use? How many people do we need involved in each case to get something implemented, and then to review it and optimize it?

We will also examine how a year long planned calendar can also help with planned training and self-development as well as training and development of the team.

Time Blocking – A Revolutionary Skill That Changes Everything

We're going to talk about time blocking for you and training in time blocking for your teams. Because multi-tasking is a lie and only by blocking time to think at higher levels can you ever hope to achieve the best results and your true purpose. Without it, tiny and inconsequential things will fill your day and your life.

Measurement, KPIs and Data

We'll talk about what you need to be doing in marketing, in sales, in finance, in terms of cash flow and KPIs. The Kahuna folks will be happy to see that we are going to think about finance and data as a guide to help us to predict and plan for the future and not just as a look into the past.

Customer/Client/Patient Service

We're going to talk about customer/client/patient services and how we retain them, and how we get them to make referral. We're also going to talk about training and self-improvement for ourselves and for our teams. So we're going to be looking at really tactical things.

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Part One – Meta- Level Force Multipliers – Building and Maintaining A Superior Mindset and Resiliency

So let's start with an exercise to get your mind in the right place. As noted, the meta-level force multipliers all have to do with improving your mindset and your resiliency. By honing them, everything you do is with a more balanced/realistic/optimistic mindset and from a place of resiliency. When you have improved mindset and resiliency, you're making better strategic and tactical decisions.

I have an exercise (a series of things) for you to fill out and to do that will help you to jump start the year with some new insights, self-awareness and clarity. Let's get started. Get a pen. Some of you will have gone through this before, and some of you will not have. So those of you who are in private coaching will have gone through some of these, or if you've attended certain meetings but not others.

My discovery in going through these stem questions with people is that, some people prefer to say, "I am most confident when these things are happening." Like, "When I get to work early," or, "When I get a good night's sleep the night before, I am confident." Others prefer to say "I feel most confident when…". Either is fine and perhaps try it both ways and determine which way of doing the stem questions works best for you!

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MINDSET EXERCISES:

STEM QUESTIONS:

The seven questions are as follows:

"I feel/am most **confident** when…"

"I feel/am most **creative** when…"

"I feel/am most **innovative** when…"

"I feel/am **the best leader** when…"

"I feel/am **most at peace** when…"

"I feel/am **most powerful** when…"

"I feel/am the **best and most attentive listener** when…"

Next, I would like you to pick one more feeling or state of mind that you'd like to better enjoy. You might like to feel more powerful, more energetic, these kinds of things. Use any word that describes something you'd like more of, or to feel more of, or to be more of on a day-to-day basis.

Frank: Clarity.

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D. Frees: Clarity. Okay, good.

"I feel that I have clarity when…" would be the one for you.

So we each are going to do these, "I feel or am most confident," "I feel or am most creative or innovative," "I feel or am the best leader when…" And then, each of us should have one more. Frank, in your case, yours would be "clarity." Andy, yours might be something else, "I feel most excited or inspired when…" This could just be something that you feel, and it's going to be custom to you.

D. Frees: Would anyone like to share, either in the chat or by unmuting, the word that they picked for themselves? And I could start off by saying, this is the exercise that I did.

"I feel most influential when…"

And the reason, again, I'm having you guys share these with one another is, there may be a state of mind or a feeling that you'd like more of that didn't even dawn on some of us that we will go, "Yeah, I would like to have more of this." And then, we can do the stem questions ourselves, on our own. Yes, Anylise? Anylise is jumping right in. Nice.

Anylise: I chose three words that are synonyms. They're "peace," "serenity," "calmness."

D. Frees: Okay. So, "I feel most peaceful when," "I feel serenity when…, and I feel more calm when…"

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Okay, good. That is awesome, because calm and serenity are really a place where you can do lots of other work, so I do like those. So “peace,” “calm” and “serenity.”

Lauren: One that I had wrote down is, “I feel that I’m the best listener when…”

D. Frees: Could you share one or two of those you feel that you’re the best listener, you know, actively listening when…? What were one or two of the things that you had as an answer to that?

Lauren: I said that I feel like I am the best listener when I have energy. So kind of when I’m more awake and alert, I definitely listen better. And I also feel that I am a better listener when I am less distracted, so when I’m not multi-tasking.

D. Frees: Also, I have done, “I’m the best listener when…” in a previous exercise. And one of the things I had down for that is, “when I have a second.” And this is a technique that I learned from some very high-level negotiators who were hostage negotiators and also in interrogations, same thing, having a second or a third person who is solely tasked with observing (or a videotaping), because we divide the limited bandwidth that you’re talking about here to try to listen actively. And so, it’s really good if we could have a second or a third person watching or listening with us, that we could go back and review, because they can see and hear things from a slightly different perspective. So that’s not one that a lot of people have down, but it was a pretty powerful one for me.

Christine: We’re talking about clarity as well. And I feel like when I’m not overscheduled… And obviously, some of these categories, if you’re well-rested and you’ve been working out, I just think you’re more innovative, you have more clarity.

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D. Frees: Here's just a quick follow-up. Thank you very much, by the way. You said, "When I feel like I'm in control." So a really good thing to ask when you hear that sort of response from a client or somebody on your team is, "And how do you know when you feel that? What is it that lets you know that you are in control?" Think about both of those questions.

D. Frees: All right. Lee, do you have one? And then, we'll jump to the next thing.

Lee: For my individual one, it was "focused." "I am more focused when…" when I'm pain-free, rested, when I'm in a quiet, distraction-free environment, and when the task is exceptionally challenging. Boring tasks take me out of my flow, and I'm definitely not focused.

D. Frees: So notice these fall into a couple of broad categories. But two big categories are environmental (external) and feeling (internal)… So a lot of us are making an observation that we actually feel better as a result of something external, which is environmental which, a lot of times, is within our control. But sometimes it's one, that is internal. A lot of us have said we want to create and cultivate a feeling of calm, and we want to be able to create and cultivate that even when the environmental piece spirals outside of our control. Because anything external, we could do the best we can to control it, but there'll be times when it's not within our control. So I like to practice feel the way I want to regardless of a calm external environment (that I might not be able to control).

Just a quick recap.

Stem question review -

We were doing a series of exercises to improve mindset, which were a number of stem questions, "I feel most confident when," "I feel most creative or innovative when," "I feel

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that I'm the best leader or I am the best leader when." And then, we each pick another one to work on for ourselves. **So I would encourage you to just go back through these and make a note of anything in particular that's within your power to do.** So if there's something you want to feel more of, and you go back and you look at this stem question and it says, "When I'm really well-rested," well, that's within our control to find the time to be more rested.

"When I'm in a quiet and calm environment where we're not getting interrupted," well, that is probably within your control. It's not easy to do, but to create a physically calm environment and to find times and block times when you're just not going to take inbound calls or allow for interruptions. So go back and look at this with the idea of tactical deployment of it. What is it that you can take from this exercise and actually go do?

What's within your control, either to manipulate the external factors that you've identified, or to cultivate within yourself a mindset that's more consistent with what you've described?

Building a practice of GRATITUDE -

For example, in this Meta-level section, I had down here, "Gratitude is a real cultivator of a number of these desirable results." So, building a process to experience gratitude regularly often produces desirable changes. And we've all probably done this at some point and we've probably benefited from it when we were doing it, but we don't do it consistently. This is why I have, throughout my life, had a practice of documenting in the morning what I'm grateful for, and/or in the evening, what I was grateful for that happened that day, or what I'm grateful for, generally.

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It helps us to get real clarity about the fact that we have way more resources, people and relationships in our lives that are supportive of us that we don't just generally recognize during the day. And that puts us in a much more optimistic, much more empowered mindset. So there's something very practical on this sort of Meta-level mindset stuff that you could do, which is to develop and implement two practices. One is to go back and look at these stem questions from time to time, or create these stem questions for yourself and then say, "What is within my power to alter or to change?

How can I change my environment and how can I change the internal piece through meditative practice or whatever's been…?" A bunch of you have suggested these things. But a gratitude practice, a time either in the morning or evening (or whenever you can do it) that's carved out to briefly note what it is that you're grateful for. Because this is going to really trigger a change in your mindset, and it's easy to do. It's just a very powerful exercise. So don't skip over that because it's easy. Don't skip over it because you say, "Oh, I do that." … do you really?

I say that I do it, and at certain times of my life, I've been really very methodical about doing it. But have I done it enough in the last few weeks? No, I probably haven't. And this is a very difficult time, so anything that we can do both, because of COVID and the electoral stresses, and other things like that on people, and the financial effects or unpredictability on lots of our businesses and practices is beneficial. So this is a really good time to make that part of your practice, because it releases a whole different set of neurotransmitters at a whole different level that makes you really much, much more resilient.

Expanding Your Comfort Zone -

One of the things that will be in an upcoming intelligence briefing is an article by Grandmaster Somnath, on expanding the comfort zone. For those of you who were at

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the live event, you will remember Som's discussion that even a little change in the comfort zone in three dimensions provides a radical and large change in where you're comfortable working. So you might say," Well, the comfort zone is the comfort zone. How do we expand it?"

So at that live event in October, we took everybody shooting. Many people think that's an extremely dangerous activity. It's not so dangerous when you are trained and practiced in firearms safety. Also, you might be super confident at doing it, in which case, you're going to be focusing on, "How do I do it better?" Or you might never have handled a weapon before, or you might feel nervous about handling a weapon. And so, there were all these things that we built into the nature of that exercise that Som talks about in his article which, even for people that had been shooting before, expanded their comfort zone. There was also a ranger master and lane monitors there helping us to shoot. They were all experienced at shooting. But they expanded their comfort zones through the experience of teaching others to shoot or to shoot better.

So what happens when we expand that comfort zone a little bit in all dimensions, is that we've just gotten a whole lot more capability and it doesn't contract or snap back to a smaller zone. Once you've done something that takes you out of your comfort zone and you've been able to do it successfully, or even if you've failed and you become dedicated to doing it successfully, you have really expanded that comfort zone.

Arianne, you were on the TV show American Ninja Warrior and that took you out of your comfort zone. Am I wrong about that?

Arianne: Absolutely, way out of my comfort zone.

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D. Frees: Yeah, I'm willing to bet we would not have seen the video of Arianne violating the lockdown rules and dancing with her friends after consuming God knows what, if she hadn't done "American Ninja Warrior." I'm just conjecturing wildly here now, but…

Arianne: Right.

D. Frees: And by the way, if you have a comfort zone like mine or Buster's, remember, Buster and I have shot at people, people have shot at us, and we've had things blow up around us, we have these massive comfort zones, and we are still always trying to expand them.

EXERCISE - Doing the thing that's causing fear or holding you back -

I try to figure out, what is something that, up until now, I've been afraid to do or worried to do, or that I think is dangerous, or that I've always wanted to do but haven't? That's usually another indicator. And I schedule that. I just figure, "Here's something that at some level, is bothering me, worrying me, preventing me from doing it." And by the way, I'm not always successful at it the first time. If I'm successful at it the first time, I sort of assume that I didn't go far enough, you know, I didn't make it tough enough. And then, I will often schedule a follow-up to that.

Now, this doesn't have to be something that's physically dangerous. And if it is, you should get lots of coaching and be careful about it. But this could just be something simple that you're afraid to do or haven't done, or you say to yourself you want to do it, but it hasn't been done. And so, that's an indicator that you've got some mental block or barrier. So each year around this time, I figure out, what is it that I'm going to do? And then, I put that on the calendar and I go and do it. So for some people, this is crazy stuff like running with the bulls, but like I said, it doesn't have to be that. It can just be something that for the moment, is either overtly or covertly outside of your comfort zone.

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So pick something, get the right level…an appropriate level of coaching or information or facilitation, whatever it might be, and then go and do that thing.

And you'll be surprised/amazed at how getting that out of the way early in the year just resets the mindset as well.

Remember, Meta-level force multipliers heavily improve the mindset and resiliency.

So what are some of these strategic things?

Summary of Part Two – The Most Important Strategies To Consistently Get More Of The Right Things Done

Now that we have clarity of Purpose, Values and Mission, when we're thinking about strategic and tactical actions, we're thinking about them in a better, clearer, more powerful way and with a better mindset.

Strategic force multipliers are all about using the tools that are available to us in the best and most effective ways to achieve what we want, to help us to make the right decisions, to deploy the right tactical action, to react if the tactical thing fails, to take the next step. Strategy helps us, if it succeeds, to optimize it. So strategic-level force multipliers are all about having tools and systems in place that help us to think about these tactical things that we're going to do in a new and more efficient/effective, and powerful way.

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So every year, I go back and I clarify, in writing, what the purpose, values, mission of the businesses/practice are. I'm including my professional practice, the real estate and the publishing speaking business. I also facilitate this process each year, for the businesses where I sit on the boards. So every year, we're going back and examining purpose, value, mission.

I also do this for myself, what's my personal purpose, value and mission?

Now, to be fair, your purpose often doesn't change. But speaking to you as somebody who's had several close calls with death, those have focused my thinking about my purpose and some of my values and have, to a greater or lesser extent, tweaked those from time to time.

And you don't have to wait for a life-threatening spinal cord injury like I did. You can achieve some real advantages over your competitors and in your marketplace, by going back and clarifying and revisiting them. And then, let them infuse and guide all of your day to day tactics and actions.

They help to guide every strategic decision and system that we use during the year.

Here are some of the strategies that guide us…

CLARITY and ALIGNMENT in SYSTEMS, Thinking, HIRING, ONBOARDING, TRAINING

D. Frees: One of the reasons the ad reflected it, the hiring process reflected it, the onboarding process reflected it, is because we took the time to clarify that we really value team and what it means to value team, and how do we know that we value team,

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and how does everybody on the team know that we do it, because everybody has their own test for that. So we've thought long and hard about our purpose, our values, and our mission. And I have a personal mission for over the next year, I have a personal mission for over the next five years and the next 10 years.

I have a personal mission for my life because that's getting to those things that we talked about at the event, the difference between the finite game and the infinite game. And for those of you who weren't there, I strongly recommend… It's not a scholarly book, but it's not a bad book to read and think about these things, Simon Sinek's "Infinite Game." And there are scholarly books which I'll recommend to you if you want them.

But the idea Simon Sinek is suggesting is that we consider is going beyond short-term business measurable KPIs in the traditional sense - just focused on the last quarter's earnings and instead, developing metrics to measure when people are doing these other things that are more important to the long-term success of a business.

In particular, within a business that is dedicated to a purpose and values that give it a purpose and longer than just the life expectancy of one of the principles of that business (or the teams that are within it). He's suggesting that we build businesses that are designed to bring people in that want to be part of that higher purpose. So that the business survives the founder's involvement and that it serves a purpose beyond mere profit.

One of the things I also remind myself of is that I'm going to seek higher levels of alignment of our decisions and systems. I mean, the last five years, we've done a way better job of this than we ever did before. But once we have clarity about the purpose, value and mission, I'm going to constantly be testing. When I go to think about my

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avatar for each of the products and services we offer, I'm going to be asking, "Is this product and service really in alignment with that? What can we do to put it more in alignment with our purpose, our values and our mission?" Is the avatar or the person we're going to help, is that really in alignment with it? And should we be narrowing it, expanding it, or getting a different understanding of what the avatar's needs are?

By the way, just a quick reminder.

Whoever it is that you sell to, are their desires, needs and worries and aspirations going to be identical to what they wanted before the COVID pandemic, or are they going to be different? I'll answer it for you. They're going to be different. We're asking our clients these questions all the time. And some of the fundamental ones don't change, like, "I want to leave a legacy to my children based on the hard work that I did through my lifetime," or, "I want to leave a legacy to my grandchildren." Those don't change, but a lot of what they want and expect from us and how we provide our services have changed. And the timeframes when they want and expect these things do change, as well. Just be aware of that as you go. So we're constantly asking, in the tactical things you're going to see, "Okay, if we're going to do an editorial content calendar and we want to know what we're publishing information on, are we publishing information to appeal to the right avatar? Is that avatar and that information and what we're trying to get that avatar to do really in alignment with our purpose, values and missions?

LEARNING TO SAY "NO"

One of the things that that lets us do this is the next step, which is learning to say no. And I'm probably way better at this than I used to be, but not good enough at it. I got to where I am now, in large part, by saying yes to everything and too many things. And that caused me to develop some bad habits which includes the confusion between busy

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and getting the right things done. Now, a lot of people look at me and ask me questions because they're fascinated by how much I get done. But the real test is, am I getting a lot done of the right things? And that takes the ability to say no.

So I'm going to republish an article I did for you some years ago on the specific skills of being able to say no, because when we say yes to the wrong things, there is a high cost to that. When we say yes, we are, by definition, saying no to other things, because there's a limit to how much we can do individually. So if we say yes to the wrong stuff, we are in effect saying no. What happens is, a lot of times, I'll say yes to somebody for something that was dubious that I probably shouldn't have. And then, the universe rewards me by having a phenomenal opportunity come along that now, I cannot do because I said yes to something that was stupid.

And had I changed…or had I looked at what's really important to me and said, "Is this thing in alignment to it," I would have said "No!", and it would have allowed me to do the other thing, whether it was going to an event, or training, or spending time with a family member. I can't tell you the number of times I've said yes to something that I shouldn't have, only to have an event where one of my kids wanted me to come see them ride or whatever it might be, and now, I can't do this other thing that's important to me. So don't minimize this idea of really learning to say no, and that there's a high cost to saying yes when you shouldn't. All of that becomes easier when you have the clarity of your purpose, values and missions.

Although I will say about two years ago, I got a genuine compliment from a client who called me and said, "Would you serve on the board of directors of this nonprofit?" And it's always hard for me to say to no to those because it's a noble purpose. And I immediately said to her, "No," and she said, "Wow, that's not usually the response I get. Usually, somebody comes up with some namby-pamby excuse." And I said, "Yeah, no. I

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know that's important to me, but it's not important… I know that's important to you, but it's just not consistent with what I'm trying to do with the limited amount of time I have available now for nonprofit organizations."

Lisa's smiling because she could also tell you the hundreds of times I've said yes to something and then I came to regret it later. And I invariably have said to her, "I'm going to regret this later, aren't I?" And then, I do. So let's try to skip that part. Let's try to skip that part where I have to sheepishly go back to Lisa and say… Yeah, Lisa's giving me the thumbs-up. I'm getting better at it. So cultivate the skill of saying no to what matters very little so that you can say yes to what truly matters.

This relates also to the idea of 80/20. So for those of you who have been around this world for a long time, you know that this 80/20 business is basically baked into the universe's pie. It is everywhere.

80/20 STRATEGIC THINKING AND DOING

You wear 20% of your clothing in your wardrobe 80% of the time. Same with shoes. You spend 80% of your time in 20% of the space in your house. You have 10% or 20% of your very top client space for your customers that produce the vast majority of your profit. And on top of it, they are the ones that send you, generally speaking, more of the better referrals and perpetuate your practices and your businesses. And then, conversely, you have a bottom sort of 20%...and you'll start to nod when I say this, who are the complainers.

And you took this case, or you brought out this product line which wasn't in alignment, or you produced this content that brought in the wrong kind of people, and you took them even though you shouldn't have. And then, they complain and complain and

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complain, they make you redo things over and over and over again, just to barely satisfy them. They never send you any clients, customers or patients in referral, and you have zero margin or you lose money on them. And worse yet, they keep you from being able to give your best clients the time, attention and resources that they deserve.

So there are two ways in which you should use this knowledge. One is, let's work on looking at the 20% and saying there's an even smaller piece of that who are the best clients. So for example, if we have really great clients that are easy to work with, or patients, and they accept your advice and they came to you because they like the style of how you do things and they're easy to work with, that's going to mean you get that work done faster. When you dig into this, by the way, you're going to see that most of the time, that's because they're asking you to do the work that you and your team are great at, and you do lots of it.

So you have fewer one-offs, which means that you're way more efficient at doing these really complicated things in a way that's great for them. That's just the best. Now, there's a smaller segment of them who will spend more money with you and/or will send more clients and patients and customers to you of the right type. And so, anytime we have this top 20 percent, we want to look at them and say, "What's the top 10% or 20% of that top 10% or 20%," because they will look different.

So if we are working on cultivating the better part of that 10% or 20%, and if we are really designing our content and our marketing to reach out to only the types of clients that fall into that top 20%, we're going to get a greater percentage of our clients coming in who are easier to work with and have higher margins. Lee, it's by the nature of your practice…you have this very narrowly-focused practice, that you're doing this. But within that focused practice, you're able to do it even more. There are some better, then there are…some worse.

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And so, let's stop producing the content and spending money on the marketing if that outreach that gets us that bottom 20%.

If we work both ends of the spectrum at the same time, it is exponential. So if we both look at who are our best client avatars and then we do content and we do marketing to bring in more of them, that's going to improve who it is that we're working with and our efficiency. And if we get rid of, simultaneously, that bottom 20% or we stop doing things to attract them, it's going to improve our efficiency dramatically, because we'll have more ability to reach the top of our market and to serve them in a way that they're happy to pay for.

THE MINDSET OF RAISING PRICES AND MARGINS

Doug and I have had this experience where we've raised prices over and over again. And we don't just say, "How do we raise prices?" we say, "What more can we do so that the client experience is better, and that they lovingly want to spend this additional money with us?" And year after year, we've come up with ways to do that, and when we announce them, we get more clients in who want to spend more money. And interestingly…you might not have predicted this or you might have, the clients that spend more money with us report much higher levels of client satisfaction.

SEGMENTING THE LIST AND "PRELAUNCH"

So we should be innovating… We should be producing new bundles of products and services, we should be producing new products and services, we should be launching them, we should do promotions. We should be scheduling all that out through the year

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so we're doing it at the right time and in the right way, and reaching out to the right people, but we should be making small bets.

But you don't want to spend huge amounts of money developing and launching a product or service that your buyers don't want to buy. So one of the things that I wrote about for you before, but it's been a year or two now, is a process that we have used here very successfully. We'll go out and we'll say to people, "We're thinking about doing this. If you're interested, let us know."

So a digital version of this would be, "We're thinking about doing this. If you want to get early access to this new product, service…". If you want the bonuses that you can only get by signing up, if you want the earliest access to it, then sign up. You're going to reward people for telling you that they're interested in what you're thinking about doing and launching. So you tell your whole list, "Hey, we're thinking about doing this new thing…" Even if it's just a bundle of things you had never bundled before at a price level that you had never offered before, "If you're interested in that…receiving these benefits," or, "these bonuses or the soonest access to it, then sign up here."

What you've done is, you've taken your list, your whole list of prospects, and you've reduced it down to a smaller list that's volunteered and said to you, "I'm really interested in that." So you can communicate with them more by email, direct mail, however it might be, without offending them, because they've said, "Yeah, I am interested. Send me more information as you go." You can still communicate with your big list about it, but you're not going to bombard them and risk an opt-out. So you should be thinking about things like this and then testing them in a small way like that.

So you're not sending out a direct mail letter to 5,000 prospects without knowing even if the offer is of interest to them or if it works. But be thinking about these new things,

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these new offers or promotions of old things or new bundles that you're going to be producing specifically with the clarity of your purpose, value and mission, and making sure they're in alignment with it.

Complexity Versus Simplicity

Complexity versus simplicity. We should always be striving for simpler. But don't deceive yourself. If you're at a certain point in your business…typically, it's two to three to four years in, you're going to have moved from simple to much more complicated. And it's somewhere between three and five years in for sure, but certainly by the time a business is 10 years in, it isn't going to be simple anymore.

You can't just say, "I want the simplest solution to this thing." If you've got employees and you've got some contractors and you've got service providers of some kind or another, and you've got lots of different kinds of clients with lots of different kinds of offers, it's going to be complicated. And so, simple solutions just are not, generally speaking, what you can do. At the start of a business, you start it up, you're in year one, you're in year two, it's by definition going to be simple because you're just starting up, you're building things.

As time goes on, you're going to test the different marketing and you're going to test bringing in different kinds of clients, customers, patients. The problem is that as you go on, a lot of times, we just still have the old stuff out there that didn't work. So it becomes unnecessarily complicated. So when I talk about trying to achieve simplicity here, I'm talking about trying to achieve a simplicity that's informed on the other side of complexity. So here's what I mean. Let's take some time early in 2021 or here at the end of the year, and go back and look at two ends of the work that we've done.

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THE SIMPLICITY PROCESS FORCE MULTIPLIER

So let's go look and find out, what are the 10 most-read blogs, what are the 10 most-downloaded podcasts? Depends how you communicate. What are the 10 most-viewed videos that you produced? That's going to give you some insight into what people, and hopefully, the right people want. Just because they've received a lot of views or a lot of engagement or interaction doesn't necessarily mean it's by the right people. Now, let's go back and look at that. On the other side of it, let's go back and look at what pages didn't get any attention, what writing didn't get any attention, what podcast didn't get downloaded, whatever it might be, because we want to stop putting our effort into that.

And I'll leave this up here, "SEO and your web advisors," which in my case is Foster Web Marketing. But we'll talk about which of these we should totally eliminate, which of these should we maybe modify in light of changes that have taken place. But again, on the other side…on the positive side, you want to be looking at, "If this particular blog got a lot of attention, can we build out more content around it? Should we update that to the 2021 version?" So Lisa's just helping me right now to update an end-of-year blog that we have every year on gifting and things that people should do by the end of the year.

And we've been expanding that and updating it, but adding more and more information to it every year. And I think, if I'm not mistaken…we'd love to go look at the data on that, that we drive a lot of content to it…or we've got to drive a lot of traffic to it through our hard-copy newsletter and our electronic newsletter. But it gets organic traffic as well. So you want to go back and look at these things and always be thinking about them in terms of complexity and simplicity. What am I doing that I can stop doing because it just hasn't worked? Not only it didn't work in 2020, it didn't work in 2019. The chances that it's going to suddenly start working in 2021 are pretty remote.

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And then, also be informed by that, what's really working, what's not. That gets us to this exercise that we talked about extensively at the live event and through the virtual players, which is, I have a process which I'm going to teach again. Molly just went through this with Foster, where we're teaching people how to use this four-step process of when you're working with your team and asking them what is working, how do we know it's working, why do they say it's working? And then, what's not working, same thing. We go through and identify things that are working or not working.

What's Working and What's Not Working?

We can do this with respect to a particular process. We can do this with respect to email, for example. We can do this with respect to a separate funnel. We could do this by an area of the company, like what's working in marketing, what's not working in marketing, what's working in sales, what's not working in sales, what's working with measuring our KPIs, what's not working with that? So there's lots of ways that we can use this. And then, we go back and we say, "Okay, what's not working? How do we fix it? Or is it something that we can kill off and stop doing?

What is working? How do we either optimize it, do more of it in the same way?" For example, we do four newsletters a year. Should we be doing six? Would it make any difference, would it improve the results or not? Would it be overload, would it be counterproductive? The other thing is that the newsletter's working with estate planning. Should we be doing a hard newsletter in our elder law section? So that's doing more of it in some other section.

We do the what's working and what's not working exercise on a regular and ongoing basis. That leads us at the end of the year, to be way more informed when we do our SWOT analysis.

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SWOT ANALYSIS

And I would encourage you, if you have never done a SWOT analysis before, go back in your briefings because I gave you a manual on how to do them. Remember, SWOT is the internal piece or strengths and weakness. The external piece are opportunities and threats. And I would say that we need to be doing SWOT analysis more often right now in this environment where so much is changing so quickly.

But if we combine these two things, regular weekly or monthly use of the what's working and what's not working process, that will really have people prepared to do the SWOT analysis and to give you meaningful input on those. So we started a little bit late, and anybody that has to go, I'll let you go. But I'm going to stop now, so we could do as much time or as little time as we need to of QA, or if you have a story to share about any of these. So any questions on either the exercises at the Meta-level or the strategic stuff? Any observations you want to make, any stories you want to tell?

Buster: I would like to weigh in on the what's working and what's not. It's a very powerful exercise, and with your help, we're going through that now. And it is more than worth the effort to go through it at macro level and even by individual elements within your business, so I highly recommend that you do this with your company/practice using Dave's methodology.

D. Frees: Thank you, Buster. And anybody that wants to know more about this, just contact me. It sounds deceptively simple, what's working and what's not working, then review what's working and come up with a set response to it. And then, review what's working and figure out how to optimize it, do more of it, do more of it in a different place.

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It sounds deceptively simple, but there is a lot to it. What I can tell you is, once you learn how to do it, it's extremely powerful, as Buster said.

And Buster, you guys are really getting into it. But just that conversation we had the other day, I thought was powerful. So usually, when I'm doing those kinds of trainings, I come away at the end of it not really sure how that went, because you're in the midst of it. You're not trying to judge how things are going, you're just trying to make sure that people are getting value. I came out of that first one that we're talking about there, the what's working and what's not, with a real sense that that was super useful. And that's my experience with…

Buster: Yeah, and you knocked it out of the park both days.

D. Frees: Frank, you could speak to that too. We've been doing that for a while now in the coaching with Kahuna. Your impressions of the "what's working and what's not" process?

Frank: Definitely. That was one of the most deceptively simple things that you started to do with us. And it happened over a number of months until we finally kind of saw the pattern, and we are able to make some of those powerful little shifts. And we're seeing that not only in our business, but also with all of our clients. So it's really brilliant. And it seems like it should have a lot more window dressing around it to make it more complex, but as part of what's working for me is being more simple.

D. Frees: And there is a lot, too. And so, I'm working on two mini books. One is… And you'll see it in the upcoming Intelligence Briefing. I found a book called "Rules For A Knight" by a guy by the name of Ethan Hawke, which is, let's face it, just a cool name. And it struck me that we could do a "rules of" book for us. And then, the what's working

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and what's not working, I actually have a publisher that's interested in that too, so I'll keep you guys posted.

Frank, that might actually get bumped up ahead of the Business Black Ops book. It's almost done, but the other one's super easy to get done, so I may just bump that ahead. So I'll keep you guys posted, you'll all get copies, it will be very exciting.

Part III Tactical Force Multipliers

Section III is all about doing the right things, and what tactical force multipliers we should be using and prioritizing in a way that makes sense for the particular type of business or practice that you're running.

D. Frees: This section is all about the tactical stuff, what can and should we be thinking about doing. I've pared down using the 80/20 rule, literally thousands of tactics that we could talk about to the vital few. These are the most important Tactical force multipliers that should result in you getting the most return on investment from the time, money and energy that you expend on these.

TIME BLOCKING

So one of the first things we're going to talk about…and we'll delve deeply, but just going to go through the outline for today, is developing and blocking time for a content, management and editorial calendar. Time-blocking generally is the second one we'll talk about, expanding your definition of marketing and some marketing tactics that we'll talk about. Same with sales. We're going to be talking about expanding your idea of what constitutes sales in a sales process, who's responsible for the process itself and for ongoing improvement.

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FINANCIAL/BROADER KPI'S

Finance, the idea that if you're not already really looking at cash flow, because of this rapidly changing environment, cash-flow analysis is king here. And then, also developing a series of KPIs, or perhaps refining yours if you've spent time on this, to include a few predictive KPIs that are leading indicators of what we can expect. So for us, knowing how full the calendar is over the next 3 to 4 weeks and how far out the calendar's full for how many lawyers and paralegals is important. Why? Because it's going to be an early warning system. If we look out a month, it should be totally full. If we look out two months, it should be about 80% full.

If it's not, that means all other things being equal and the value of the cases coming in are equal, we're going to be down in revenue and cash flow. And if we know that (in advance), we can predict that and we can take measures (because it's a leading indicator) and we've got time to try to bring in more people, to run a promotion, or do something about it. In finance, we're going to focus on cash flow and KPIs.

HAVING CUSTOMER/CLIENT RELATIONS TRAINING

Also, we will be thinking about customer and client services and training and self-improvement, training for yourself and for your team and self-improvement for you.

And in that regard, we'll talk about developing some particular skills that are the types of skills where even a minor improvement in these skills usually result in a major positive outcome.

So let's get started.

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THE #1 TACTIC – TIME BLOCK THE YEAR NOW (OR AS SOON AS POSSIBLE)

If you had to pick one thing on this tactical side, it would be time blocking and creating a content, management and editorial calendar. So let's talk about what I mean. This is business and professional practice-changing for most people that do it. Now, it's going to sound harder than it is to do, and what we're going to describe is pretty robust. But anything you could do…

TIME BLOCKING – MARKETING, TRAINING, EDITORIAL & CONTENT CALENDAR

So for example, there will be people on this call who will have an editorial calendar where there's going to be some social media or a blog or a video of some kind every week. And there should be time set aside to have somebody within the team drafting it or creating it. There should be time before that to review it, to make sure that it's in alignment with the purpose, values and mission. There should be time to review the effect of that afterwards. So each one of these things, you have to allow time for a number of functions related to them.

But if doing something weekly…or daily, in the case of a few of our members, because they've got big teams that do this. If that sounds daunting or unrealistic, then let's use an example with Brian. Brian and I have been working on. Can he get a video or two videos out each month? How do we categorize those? But it will just not happen, and it certainly will not happen if you haven't created the time to think about it strategically, to create it or to have somebody create it, to review it, to post it or distribute it, and then to do some follow-up to see, "Did this piece of content or marketing that we put out make a difference?"

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Now, notice I'm calling it a content, marketing, management, editorial calendar. So there's a lot going on in there, but each one of those things is essential. You should have content that isn't pure marketing, in the sense that it's not PPC advertising or display advertising or some kind of promotion. But you should have content that is in alignment with and serving the purposes that you're dedicated to achieving this year. But then, you should have, throughout the year, time blocked as to when you're going to be thinking about a promotion, when you're going to be distributing the promotion or doing the creative work, and when you're doing the follow-up on the promotion.

And when I say "promotion," I mean that in the most general sense. So it might be that you're offering some kind of a sale, even if it doesn't involve price reduction. For example, every year in November, we announce to our clients that there's going to be a price increase, we tell them why, and we say, "If you book an appointment in January, February, March or April, as long as you book it now, we're going to give you the old pricing." So there, we haven't reduced our pricing. We just haven't raised the cost for those people that do that.

There's also an end-of-the-year promotion where businesses…a lot of the times, the business planning overlaps with estate planning, and it is deductible…parts of it are deductible for business purposes. So we're telling people, "Hey, why don't you get that expense and that deduction in this year while you have cash flow here at the end of the year?" So there are all those sorts of thoughts. Display ad, "I'm going to run a campaign, we're going to do a community event where we'll get exposure," "I'm going to have a certain number of interviews with the local paper."

So all of these things: producing content, producing advertising, producing events and promotions, should be on the calendar. Now, again, if you're only going to do two, Brenda Geiger, who I don't think is on the call, pioneered the movie events that we've used a number of times over the years, where we'll get early access to a "Star Wars" film, for example. We'll sell it to our clients for $25, they get to see it a day before it's

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launched in theaters. All of that money gets donated to the food bank, and we have clients, when they come to the theater, bring food.

STOP SAYING NO TO GREAT IDEAS – OUT OF FEAR

It's a fantastic event, and it involves lots of interaction and it involves lots of engagement. But that's not going to happen unless you've made arrangements with the theater in this case. And in case you're rolling your eyes and going, like, "Well, you can't have a public event," we have a giant theater in town, and they are renting it out. We happen to be on a little bit more of a lockdown right now. But in general, they are renting it out at a legal level of occupancy where people could be spaced out, and you could pick the film you're going to show.

So don't just stop when something happens and say to yourself, "I can't do it. I can't have a public event." It may be that you could still have a public event that you could still have a public event safely, that you could help still have a public event that was very successful. And remember, the situation six months from now because of the rapid rate at which change takes place, planning on having live events and having a contingent plan to push them back online is still a really good idea going out four, six, eight months, depending on how optimistic you are.

So this idea of having a calendar… And now, you might also wonder… I mentioned management in there. So what I'm really thinking about there is, have you blocked the time for your own training and self-improvement? And more importantly, have you blocked the time for the team's training and self-improvement? And I wanted to mention again that, don't feel like you have to do all the training. You have talented people on your team that could probably do training of other team members. There are programs run by state and local bar associations where you can send people.

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So you could do in-house training, and you should have a certain amount of training that's done outside of the firm itself by different people from outside, because that gives your team a different perspective. But getting that down and having clarity about who you want to train, how you want them trained, and what they need exposure to. And we also think of training in two other ways. So it's in-house and outside. And then, we also think of training on substantive legal topics. So Denise, who's on my team that works with estates, will go with another paralegal, Tammy, and they'll do some training on some aspect of estate administration.

Once again, having a content, marketing, management, editorial/content calendar where the time is blocked to think about strategically, exactly what you're going to produce in terms of content or advertising. And then, the times you create it yourself or for someone else to do it, the time set for delivery of it, the time for distribution. And then, remember the follow-up.

In this piece of content, or in this advertising, or this event we run or in this promo, did it bring us the kind of people that we wanted? Or did it get people to engage with us in the way we wanted them to? And if not, how can we fix it, or should we disregard…just discard it? Or if it did work, what else can we do to optimize it in the future, and when's that going to happen and who's going to be responsible for that? So that's our first big tactical one.

In the 80/20 of this, if you just did that and then said, "I'm going to make sure that there's some training each month, there's some self-improvement each month, there's some advertising, there's some content and there's some kind of promotion each month," you would transform your business or your practice if you're not already doing that. It is transformational. So, Dr. Dave, that was my longest rant ever. It's probably, the editor was probably damaged by COVID. That's my story, I'm sticking to it.

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D. Weiman: David, If that's you damaged by COVID-19, then I have to go back to graduate school, because I feel like on my best day, I'm not that good as you are in this post-recovery period. We were in touch while he was recovering from COVID. And every symptom that he mentioned, I had also experienced anytime I ate my mother's cooking, so I really had to be careful about that. We used to call it Ruthie's magical kitchen, where the food lives but the people don't. So there's two things that come to mind. One is that part of what I call the entrepreneur's dilemma is being nimble and reacting to things in the moment and being open to try things. And that's awesome.

But we've talked often in the mastermind about the danger of doing that, of simply implementing something. Implementation is phenomenal, and there are some excellent implementers in the group. But there is a danger of always being attracted to the next shiny object that pops up in front of us. Because ultimately, to grow a business, you want to be nimble and you also want to have some structure. And that was the second point that I wanted to make, that the structure provides not just something for you that's really important when you have it out on the counter, what we're going to do and when.

And in so many examples of things, the training world, for example…the physical training world, the seasons matter, because people are able to do some things when it's nice outside that they can't do when it gets colder. So maybe we run a program on things you can do inside when the weather is not good, what are the things that a person can do to stretch and stay nimble and to maintain their physical health? But those, just knowing what you are doing coming up has a huge amount of value, and having it on the counter and seeing it there.

Brenda, who's not on the call, mentioned the time blocking, scheduling specific times to do writing and marketing writing. And she said, "I figured out my sweet spot was 45 minutes, and that's the chunk that I schedule for that." I mean, we're going to talk about this in the next step, so I don't want to elaborate on that right now. But the second piece of this is that structure, all by itself, gives an organization a sense of being professional.

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And that's important for anyone who works with you to see that, to see that there's a structure to it, to see that there's something behind it.

Because the structure reduces anxiety, and it shows other people that there's something behind it. So anything that you can do to make that real, to invite people to a meeting where you do that review David just mentioned. But that's just part of how we do business, we understand that that's going to happen. I use Asana, a software I've talked about before in other masterminds, that really does help queue up things for the future. And to what David said, we use the Swiss army knife concept that David has outlined over the last two mastermind groups and also on these calls, and the big event in October.

We actually use a little key for which target group that piece of marketing is attached to. So in a little bracket, it will say, "EC," for "executive coaching" or, "LD," for "leadership development." So that if I'm looking at that, I know right away, what is that attached to. Why are we doing that? What's the point? Who's that reaching and why? And it relates to the positive… you know, the good avatar and the bad avatar. So the structure for ourselves is important, because it gives us a sense of what's happening and makes us less likely to deviate from that and just go grab an idea and start implementing it.

Not that that's terrible all the time, but it can distract us in the ways that David talked about in the last meeting. And the second piece is to show your organization that that thing is important, because structure reduces anxiety.

D. Frees: Thanks, Dr. Dave. Anylise is doing some substantive legal blog writing. And one of the things that we went over is that when you're talking about the content piece of this, whether it's blog or video or audio or podcast, whatever it might be, is that one of the things Anylise and I look at is, who is the avatar? And where are they on the journey, and what are we going to try to get them to do? And what's the call to action? And we do that first before she does any writing.

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And when you send any topics that you want to write on now, it's been awesome. You say, "here's the topic. This is who the avatar is. This is where they are on the journey. And this is what we want them to do." Here's what Anylise and I mean by that, is that we would speak differently to a prospect who hasn't engaged with us but who meets all of the criteria to work with us, than we would with a client who has updated their will many times and now is kind of used to it and what triggers it.

So we'd be talking to a prospect in a different way with a different voice, making different points, because what they know and what they understand and what they expect and how they feel right now versus what they want to feel, that's very different than somebody who has done this several times and kind of understands, "Well, there was a big change in the law. So I'm used to Dave telling me that I need to come in and change it. And he's going to charge me too much money and I'll complain to him, but I guess I've got to do it."

And so, we are thinking about those things in advance of creating the content.

So you should never be creating an ad, you should never be creating a piece of content, including video or a podcast or a report, whatever it might be, where you do not have a clear idea of who you're talking to and what you want them to do after that. And again, you're providing a system and you're providing a structure that makes it way more likely that all of these things that you're talking about doing are going to be in alignment with the purpose, values and missions, and therefore, kind of eliminating the friction for you.

Something that I may have glossed over unintentionally is on this content, management, marketing, editorial calendar, reviewing your systems or creating a new system. So Anylise has now been here long enough that she's starting to see things in the system that we may have just always taken for granted or assumed. And she's asking, like,

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"Why did we do that?" And sometimes, we have a good answer, and sometimes we don't, in which case, the system's going to change.

But again, having a time once a month or once a quarter where you're going to designate a particular kind of system, like intake or how a client is tracked through the process or what kind of follow-up occurs with them, setting it up on the calendar in advance that you're going to take a look at these systems. It doesn't mean you're going to trash them, it doesn't mean you're going to optimize them. But scheduling and blocking the time gives you a chance to decide, "Should we optimize this or eliminate it? What else should we be doing?"

D. Weiman: And just a real quick point. Some people feel like because your system is established, they should not make a suggestion or point something out. They may assume there's a reason for why you did it that may not exist. And so, one of the things I have found extremely helpful is to ask a question that can cause them to start thinking about the system itself and let them know, this is not carved in stone. And an example of that is, I'll ask someone, "If there's a way you can see to take even one step out of this process, let me know. I love efficiency and effectiveness, and I'd love to know that."

So what does that cause the person to do? They start looking for steps to take out of the process. And it causes them to focus on it more and to be more aware of it. But also, now, they're looking for ways we can be more efficient. And all of your processes and all of your systems have the ability to return an investment of time to you that's permanent. Because if somebody figures out a way cut a half-hour out of a process that you do with every client and there's 10 new clients a week that do that, that's 5 hours a week. That's over 250 hours a year. So there's a huge pay-off for that examination of the systems, because that's what you're using to run the business.

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TIME BLOCKING GENERALLY

D. Frees: Beautiful. Now, second up on the 80/20 of these particular tactical things that we've chosen to focus on in preparation for the next year is this time blocking, which is underlying this concept of the content, marketing, management, editorial calendar. Obviously, you're going to be much more successful when you have blocked the time throughout the year. Now, I do it, Dave uses Asana. We just do it all on my calendar, on my Outlook calendar. But I do that in part because I like having fewer places where I have to look. I have everything there. And it is true that from time to time, external circumstances interfere, and it means that something gets short-tripped. But you're way more likely to get way more done when you do that. But time blocking, in an even more expanded sense, can be radically transformational, again. So here's what I want to encourage you to do, is to block time for a vacation that you've been meaning to take and haven't. And we've all been punished. I mean, I guess I wasn't punished, given that I spent three or four weeks in Asia at the start of the year, right during the Chinese New Year and the start of the worldwide lockdowns.

But I'm glad I did that when I did it. And vacation doesn't have to be to some exotic location where you have to have a vaccine to get there. I think you're going to see that there are still plenty of places where you could enjoy and do things. But here's why that's important. It's more important to some people than others, but if you don't particularly like travel, I encourage you to do it because you're going to be expanding your comfort zone.

And if you do like travel, I encourage you to do it because you're probably, if you're an experienced traveler, going to have the experience that I do and lots of experienced travelers do, which is that when they go someplace new, they notice new things, they notice things are different. And it inspires them to think about how these differences

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could be applied in their own life. And so, you're recharging this part of your brain that helps with iteration and thinking about things in new ways and solving problems.

So time-block for things like vacation. Time-block for time during the week when you're going to do something you want to do, whether it's physical exercise or reading a book or smoking a pipe or drinking a fine whiskey. I'm looking around, and Arianne was nodding very furiously on the "drinking of fine whiskey" example.

So make sure that you're blocking time because it will be transformational. Now, the other thing is…there's nothing worse than blocking the time and then allowing someone from your team to steal it, or worse yet, you saying, "Oh, that was just for me to read a book or think about things. So I'm going to give it up." There, you're practicing making yourself weaker rather than stronger. So again, even if you're setting aside a modest amount of time each week or month for yourself to do these things, thinking about things in a new way and do something you enjoy, you're strengthening a muscle that's very important to your success. The habit/muscle of being consistently creative, innovation, strategic and thoughtful.

D. Weiman: This is going to tie into some other things and also, some things that Dave mentioned last month. But if you give yourself an impossible task, it will be more likely that that chunk of time, like, two hours of doing something on your calendar, won't happen. And the way that the default settings are on so many calendars as one hour, in fact, some clients have said, "Well, we have one-hour meetings because that's the default on our Outlook," which is crazy. Even 15 minutes of professional reading… And I do set aside time every Friday morning for professional reading because I need to stay up with journals, just like everybody else on this call.

I'd rather have 15 minutes of that and do it than leave 2 hours and take that time away for something else. And the reality is that in 15 minutes, I can pretty much get through a journal, or an issue of the "Harvard Business Review". And these incremental changes

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are important. And in fact, in Robert Maurer's book, "One Small Step Can Change Your Life", he talks about how we don't want to set ourselves up for failure by causing anxiety inside by the very task we gave ourselves.

And the beauty of these small efforts really does add up over time. That 15 minutes a week is an hour a month. That's a day and a half of reading, if I do it the right way. And so, sometimes, these smaller increments are really powerful for getting these things that are important done. A Ted talk that was done a few years ago talked about the learning zone and the performance zone, and if you're performing all the time, you're not getting any better. So the person who did the seminar talked about the learning zone, but the learning zone doesn't have to be five hours a week. The learning zone is small things that you do on a regular basis.

And when you get in the habit of doing those, it really does make a difference. All the things David is talking about right now are putting things in, it's feeding yourself and it's feeding the energy, feeding the ideas. You need that because so many of us spend a lot of time expending energy and putting things out there. Also, as I look around the Zoom call, there's nobody on here who doesn't serve another person in your job, whether it's a team member or an external client. That's putting energy out. So scheduling putting energy back in is really important.

D. Frees: And Buster will like this, I think. It's the idea that we are taking the time to sharpen the saw or sharpen the axe. Because if we're trying to chop down that tree with a dull saw or axe, and we are trying to do it with low intellectual or physical energy, it's going to be a way, way, way harder job. Whereas if we take an hour here and we take an hour there to sharpen the saw or sharpen the axe, and we put in the time to do physical exercise, we are going to be stronger. In fact, I just had a doctor say to me, "For someone as fat as you, you are in astonishingly good health," which I think is a genuine compliment.

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D. Weiman: I don't people talking to you that way.

TIME BLOCKING FOR HIGHER LEVEL THINKING

D. Frees: But this idea of time blocking… And to Dave's point, once again, you're going to schedule some time to do reading that enhances you professionally, but you want to schedule some time to read something that you want to read. And I encourage people to pick something that is engaging to you but maybe pre-dates the digital era, because I can tell you, when I read things written in post-digital times, certainly from the early 2000s on, I observe a trend of sloppier and sloppier thinking, because it's so easy to write so much.

And once we birth the baby… This is just also something to keep in mind for your own work. Once we've documented an idea, editing it down and taking things away is hard to do. So you get, a lot of times, this sort of author idea vomit that isn't really refined and doesn't reflect the thoughtfulness that you saw in writing from the 1600s through the 1980s, where people had to physically write things down. And so, they thoughtfully edited before they wrote it down. And then, they went through a second round of editing before, a lot of times, it went to the editor, who also grew up in a pre-digital world.

So I encourage you to think about finding something from the time of the printing press on. I saw a show on Victorian farming, where they were restoring a Victorian farm. And there was a book that all Victorian farmers relied upon, it was like a Bible of Victorian farming. And I bought it. And it was published in the mid-1800s, and it is fascinating. But here's the thing, it doesn't have anything to do about the law, but it has everything to do with thinking about things in a totally new and different way than I ever did before. But I'm also spanning hundreds of years of farming knowledge that's been carefully distilled.

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When I say “carefully distilled,” the book’s still about that thing. That is, I’m going to predict… And probably Anylise will be worried about this. That is going to have an effect on the way I’m thinking about things and doing things that would not have occurred if I hadn’t made the time to read that book. I also have undertaken to make sourdough bread, and I’m creating starters, I’m making leaven, I’m creating all different kinds of bread. Robin was inspired by it, so she made a bread she’s fermented for seven days called babka, chocolate babka. I just this morning ate some.

Here’s the thing. This is what Dr. Dave was talking about, about the learning time. I’m learning to do something I did not know how to do before. It’s very technical, there are all kinds of steps. You have to understand why you have to let the bread rise each time and why you shape it multiple times. And as you do that, you learn how other people have thought about things and condense them into a system where they could reproduce a really outstanding result over and over again.

And with breadmaking in particular, it turns out that just getting the surface tension of the dough right, as you scrape it across the board makes a giant difference in how it turns out. And that is something that with practice of doing… So you learn it the first time, but you don’t really learn how to do it right, except through repeated activities. So there are all of these metaphors that you get from blocking the time to do these things. Now, I just happened to have gotten a fairly high skill level with this when COVID hit, and then, mysteriously, no one wanted my bread that I had made. So there was a lot of discarded sourdough for a couple of weeks. I tried to tell people that, but they were like, “No, I’m good.” I said, “The science is pretty clear. You’re not going to get it just from…”

By the way, everyone should know that the most common response when I tell people that I have had had COVID…I make sure to use the past tense, is that they take a giant step back, they say, “Oh, my God.” And then, they follow that up by asking, “Do you think you’ll have hideous long-term effects that will make your life miserable from now on?” Which is not an encouraging thing to say to someone. I actually feel fantastic, so I

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tell them, “No, I think that’s unlikely.” And then, the next thing that fascinates people is how fast did I get my sense of smell and taste back, which in my case, was very fast. But it was interesting to have no sense of smell or taste at all for a while. And Arianne, just to reduce the finger-shaking, I did lose, like, 10 pounds in about six days. I had a total lack of interest in food.

MARKETING TACTIAL FORCE MULTIPLIERS

D. Frees: Okay, marketing. So here’s the thing. And marketing is a giant leverage tool. If you do it right, you can make a massive multiplier of the spend of time, money and energy on it. I would encourage you, in terms of thinking about marketing for 2021, to expand the idea of marketing. So this is how I look at it. Any place at all where I have a contact with a prospect or a client or a past client is a marketing opportunity. So the obvious ones are when you put out a pay-per-click ad or you put out content.

The less obvious ones are, what did they see when they pull into your parking lot if they come to see you? If they land on your website, how easy is it to navigate? If they send you an email, what is the nature of the response? If they call your office, how does the call get routed to the right person? And if it gets to the wrong person, how do you fix that quick before them? So every place where there is a point of contact, when we send out the documents to the client that are finished, we spend a lot of time thinking about, “What should this look like,” when we created the portal, so that people could see their documents electronically.

We spent a lot of time thinking, “Well, this is a little bit of a technical thing. How are we going to prepare them for this?” So any point at all, ranging from what the stationery looks like, to what the reports look like, to what the envelopes look like, to what the phone call reception sounds like, go back and identify every point of contact that you can identify with your prospects, your clients and your former clients, and determine,

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"How can we enhance each of these points of contact?" Now, obviously, you'll have…if you do this right, 20, 40, 50, 100 points of contact. And you're not going to try to enhance them all.

So the exercise here is to go through them and begin to realize there are a lot more points of contact than you think there are, and then to pick the ones that you think will make the most difference to the client or the prospect, knowing all of the things that you know about them. And then, let's go and enhance two or three or four or five of those most important ones. And this is something that Lisa and I do either formally or informally. Well, we try to do it every year.

But I gasped once when I was going over this with Anylise when she first joined the firm, and then I realized that it looked like I hadn't reviewed this one email sequence in quite a while. And Lisa literally said, "Calm down. I changed all of that already." So it's not just that you're going to do all these things, but that you want to identify them so that people on your team who are uniquely qualified to make sure that stuff that happens, make sure it happens. Do you remember that, Lisa? You said it with a loving and yet scolding voice, like, "How dare you think this wasn't done?"

D. Weiman: This thing that David described, like the pulling into the lot. To the extent that you can, if there are areas of your space where clients sit or come in, particularly… We don't really think to sit in the chair the client sits in, but you'll discover a bunch of dust if you do that. And so, shopping yourself is really important, too. I know when I went to sign my will at Dave's place, there was a tray…a metal tray, silver tray, that had these really nice pens on it. It was super important that I felt like I was doing something that deserved that level of care, and I noticed that.

In the conference room, I went into a diabetic coma eating the… I think they were Ghirardelli chocolates wrapped in a tray there. All of these touches, they're literally touches. They're things that I touched or handled when I was in the office. But shop

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yourself too, and sit in those waiting room chairs and see what you see. Is there enough room for people to get in and out? Those little things make a difference.

D. Frees: Even the little things in the post-COVID process, we've had clients remark upon them. So the things that we do that the science is sort of dictating that we should do… For example, because there's a little kind of pinch point at the front door, we make sure that the client calls from the parking lot. And we explain to them, "Hey, this is for your safety. We just want to make sure that everybody else is out of the building from the prior appointment, and that the conference room is sterilized and cleaned up before you come in."

So if you just told people, "Here, I'm going to give you another job. Call when you get here…" This is like Ikea, who will make you put your own bookcase together because you work for Ikea, I guess. And you've got to put your shopping cart back, too. I never signed on with Ikea to do any of this nor, by the way, do I do it, because I refuse to go to Ikea. But if you explain to people why you're doing this and that it is for their health and their protection and to enhance their experience.

EXPAND THE IDEA OF MARKETING

So expand this idea of marketing, do this survey, and look at how do people have contact with us before they really get to know us, as they get to know us, when they engage with us, while they're clients of ours. And then, even if they cease to be a client for some reason, how else do they have contact with us, and how else could we enhance that experience? That's super powerful. Now, obviously, there are lots more marketing tactics. And that's what my coaching calls are for.

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ASK BETTER MARKETING QUESTIONS

Just as we encourage you to think about marketing in a broader way, I would also encourage you to do the same thing with sales. Start thinking, "When the sales process starts and who has responsibility for it?" Once it reaches a salesperson, whoever that might be within your organization, what else *could* we do to enhance that experience?

What else can we do to enhance the quality of the leads reaching salespeople? What kind of follow-up can we have to leads that don't convert? So thinking about the sales process in a bigger, wider way of thinking about it will reveal to you additional places where you may be able to optimize the sales process that you wouldn't have even thought of or detected if you didn't think of it as part of this bigger interaction between you and the prospect.

Whereas marketing is reaching prospects and people that don't know you, generally speaking, sales is taking those prospects, however well or poorly qualified, helping to sort them, and then either getting them more information, getting them into the hands of somebody who's going to do intake on the phone or sell them on the idea of the appointment, or whatever it might be. But then, there's probably going to be a second round of sales. And if we spend enough time thinking about this, we're also going to realize that a certain percentage of clients, patients and customers that come in are going to want to immediately spend more money with you than everybody else.

That brings us to…

CREATING BUNDLES, UPSELLS AND MORE

Do you have upsells that you can present to them at the time of the initial purchase, and do you recycle through and offer them those upsells? Because a lot of people who

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aren't immediate buyers… In other words, they're people that just want to buy, buy, buy. They've found somebody they like. So for Arianne, that would be, somebody comes in and she sells them a package of services that they're going to take over the next few weeks or months.

And then, a certain percentage of those are also going to want to add, "Oh, well, you're working on your back and golf season's coming up. So if we work on your back in January and February, are you going to want the golf package in March before the good weather comes out?" And a certain number of people will go, "Yes." Other people say, "No, I don't know about the golf package." So do you want to offer it to them again in March, even if they said no? So thinking about the sales process as being bigger and covering more turf, where you're in contact with those prospects and those customers will also help you to develop other ways of giving them a better experience.

And once again, I want to emphasize that the clients that pay us the most money tend to be the clients that give us the very, very best reviews. And the clients that post a mediocre review or maybe give us weak feedback are often clients who were very budget conscious and took up large amounts of time. So be bold and develop higher margin products, services or bundles that wow clients/customers/patients who want these higher levels in any market.

COMPARING RESULTS

Doug and I do this all the time, which is, we'll compare what's the selling results and experience. For example, I will see Doug selling one thing and me selling another, but the two of us not selling the other thing. And then, once we find out, we're able to duplicate how we present it to the client, so then, all of a sudden, we're both selling some of those same things. So that can be very powerful. It can be a big lever in

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improving sales. Be sure to take time and share the selling experience and be watchful for the best practices of each person selling.

REVIEW

Okay, so just a quick review. Develop a content, marketing, managing, editorial calendar and block the time to do it. Take the time-blocking further. You don't have to get carried away. It's better to have modest chunks of time, but time to allow you for personal development and professional development, but also time to do things that you maybe have always wanted to do but otherwise wouldn't do, because your calendar just get full. And be religious about keeping… That's the muscle you want to build, "I'm going to block time, and then I'm going to fight anybody that tries to take that time away from me."

And Lisa can tell you, we both fight that battle.

She fights that battle for me every now and then. And listen, people are just trying to do their jobs. But part of your job as the person that's going to guide this business or practice is to hone your brain, your iterative powers, your ability to do problem-solving, your ability to be a better leader.

D. Weiman: You know, when you mentioned Lisa, it occurred to me that folks shouldn't be shy about enlisting the help of someone else to help provide that structure. Sometimes, we're more likely to abide by it if somebody else scheduled it who is part of that inner circle. I know Lauren has blocked out time to work on the newsletter, she's blocked out time to work on marketing. And it's the same quantity of time every month, and I may move it around. But I have to tell you, when I look on that schedule and I see it there and she's put it there, it gets my attention. And I'm getting better at doing it.

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Marshall Goldsmith, who came up with the questioning method where there are these six questions that he suggests you ask yourself at the end of every day, I think we may have covered that on a prior call. If we didn't, I can…I'll mention it at another time. But basically, he said he's up to 32 questions now, and it doesn't take that long to go through them. It takes me a minute. He has his assistant call him, she asks him the questions. Boom, boom, boom, boom, boom, he answers them and they're done. And so, these things that allow for both efficiency and also compliance matter.

And if you feel like having somebody else put it on there, as long as it's within the rules that you've set up. And I know that Dave and the practice, they do that. If that works for you, do it.

D. Frees: Now, a review of two other things that we mentioned, first the finance side. If you're an owner or operator of a business or a professional practice, I really and strongly encourage you to dedicate yourself, starting in January, to develop some clear or cash-flow kind of analysis.

Really focus on cash flow: When does more come in? When does it drop off seasonally? Why? What, if anything can we do to improve it or to mitigate seasonal cash flow reductions? And that relates also to the second point I want to make.

Start figuring out what are some key performance indicators that you can start measuring in January and February that are going to tell you what things are going to look like in March and April.

So for example… the pipeline of realtors. How many people are they talking to where they haven't signed? How many listing agreements are getting signed? Is it above or below the seasonally-adjusted or break-even/profitable number?

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These things are going to be predictive. Brian, it probably takes what, 60 days on average between when you list and when you've got a check in your hand, 40 to 60 days, probably?

Brian: Yeah.

D. Frees: So be thinking about these KPIs that are predictive of what's going to happen in the future and that are not necessarily always smack-dab on the money. They're going to give us an idea of the trend, so that we have time to be proactive about it and solving the problems before they become genuinely big problems. Steve Richardson has done a lot of thinking about these sorts of things, so I like that. And he's starting to do things proactively, not to let it become a bigger problem.

Did you want to add some specific thoughts to that, Frank, for everybody to be thinking about, but especially on the cash-flow side?

Frank: Yes. I think the biggest thing to consider is recognizing there's a difference between your cash flow and your profitability. And a lot of times, we look at our P&L and we start to see things that don't actually reflect. Because you can be profitable and be losing money and cash flow based on timing, based on how things are categorized. So it's an easy, easy trap to fall into. So just make sure that whoever's helping you with your bookkeeping helps you understand how much…just super, super simplest buckets, what money is coming in and what money is going out, and also looking at ways of reducing your receivable cycle.

D. Frees: And margin. In the cash flow analysis, you do really need to understand margin and you should really be guided by margin, because I constantly, and this is going to come as a surprise to everybody, and people are going to say this isn't true, but it's totally true. And Frank, I think you'll be able to confirm this, having dealt with lots of businesses, that there are business and individuals running them who do not

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understand their margins and who are putting money and advertising and effort behind the selling of low-margin products and services, at the expense of leaving high-margin products and services that result in super-high levels of satisfaction with clients.

And so, what you're looking for is really a sweet spot in your organization. What is it that our organization is great at? What is it that we do that makes clients, customers and patients super happy? And what of those particular kind of services can we provide at a very high margin with a very high level of satisfaction?

And of course, we are not saying profit first at the expense of the client, patient or customer.

The way you're going to really get sustainable long-term profits is creating a sustainable and really high-level response.

So be aware of cash flow and margin. Be aware that you may not be promoting the right things. And be aware of KPIs that are going to help you be in a more predictive mode. Because remember, COVID has accelerated a trend that was accelerating, anyhow. In fact, the pace of change has changed so much that it is the Red Queen Hypothesis on steroids, and it is making that cone of uncertainty shorter and shorter. In other words, it's harder and harder to make predictions outside of a very short future time frame because changes take place so quickly.

Which is why we want to talk about, at the strategic and tactical levels, making and testing lots and lots and lots of small bets.

So those are definitely things to keep in mind that can make a radical change for the better. Now, we have just a few minutes left, and then we're going to take questions if anybody had them. But I want to reiterate something, which is client/customer/patient

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services and fixing things when they go wrong. If you do not… If you have not thought about that, it's probably because you're avoiding it.

CLIENT/CUSTOMER SERVICE

Because we all know that despite our best efforts in developing products and services, that when things still go wrong. Products occasionally don't work. They aren't living up to the expectations of the buyer. Or the services haven't solved a problem that they were intended to, whatever it might be. But developing a higher level of clarity and thinking and taking some time to schedule time-blocking to achieve real clarity, and to understand what are the things that most often go wrong, can be a game changer?

Why? How? Well first, we fix them. But two, to the extent that we can't fix them because they go wrong based on the individual needs and desires of a particular client, customer or patient, how are we going to make good? How are we going to fix that? And how do we give the members of our team authority to fix things as they go? That's super powerful. And then, the last point I'll make before I start taking your comments and questions is one that I added to this. It's a very common one for me, but I find most people don't do it. It is the lowest one of all of them that I've talked about today.

GATHERING AND ANALYZING INTELLIGENCE

But being more informed and being able to do prediction successfully or more successfully requires us to be in the active business of gathering intelligence and thinking about things. So this could affect the time-blocking. And so, coming up with sources, Dave mentioned one, "Harvard Business Review." I read "Harvard Business Review" religiously. I don't always believe things that they say, and David and I will both tell you that occasionally, there are just moronic opinions expressed there, clearly by

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academics who've never actually run a business. And I think, Dave, you said one of them should be beheaded. I'm not sure.

D. Weiman: Yes.

D. Frees: But looking at the sources of information about what's going on globally or in broader places than your market, as well as knowing and understanding what's going on in your market and what your competitors are up to and what you're thinking about doing in the future to compete with them. So in other words, gathering intelligence, analyzing intelligence, and then making changes to your system, your product, your services and how you're doing things that is responsive to that and is dealing with high-likelihood probabilities, that could be very, very important. Because nobody does these things that we're talking about.

Just a tiny percentage of businesses ever even tries. But most of those businesses that do try are super successful. In short, if you can manage, through time-blocking, to do half or two-thirds of these things, you're going to fundamentally alter the success of your business. And, Frank, you and I have had some of these conversations and I think you can verify how powerful some of these tactical things are. Especially when you're creating force multipliers/the right mindset, and the right strategic force multipliers. The exact mix of force multipliers are going to be different for every one of us, as will the tactics. But these tactics we've been discussing are pretty universal.

So the final thing before I go to your questions and we wrap things up is, there are a series of skills (which we'll be working on in the next year) which are also transformative and which super charge everything in this report. And the greatest of those, first and foremost, is enhanced communication skills. And those enhanced communication skills are really rooted in enhanced listening skills and interrogating skills, so you get more and better and more accurate information. When you understand and can use these skills, you power up all of your other skills and results.

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You can see how being good at that is going to inform all of these other tactical things that we talked about today. The ability to move from where we are, to have conscious clarity about where we want to be, and to develop a plan of getting there is super powerful. Moving the ego out of the way and recognizing that people that are in the organization and in regular contact…perhaps more contact with the client, patient and customer even than you, over more areas and over more issues, that can be very, very powerful.

Remembering details, building trust and rapport are all super powerful for any leader. And we're going to talk about those persuasion and influence skills. Persuasion as you know is hard. That's how do we get people to change their perspective and to come around to your way of thinking, or perhaps a modified version of your way of thinking where they have worked with you to co-create something.

Influence is easier. That's where, consistently, you've built trust by being persuasive and showing people things they didn't know or understand before and where they come to get great results and to know you're a source of wisdom that can be trusted.

And then, when they've changed their mind about them or done them, they have been rewarded. And they'd associate that with you, so that they begin to think in the future, "I'm going to Buster," "I'm going to Steve Richardson," "I'm going to Ed Littlejohn," or, "Arianne for something, because they've helped me repeatedly before." And so, these are all skills that we're going to be working on.

D. Frees: Well, right now, Lisa and I are going through the virtual version of the Digital Marketer's conference. We have traditionally, in San Diego, run a one-day event which is killer good. And we plan on doing that again. So we plan on having, early in the new year, a digital event where we are going to digest what we've gotten from Digital Marketer. And probably by January or February, whenever we do the SWOT stuff, early

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and preliminary data on things that have worked, so we're not just going to be talking hypothetically.

So that will be one of them, and a live event will be another. Also, possibly as early as March, more likely, May, I have a guy with the coolest name ever, Steve Babylon, who was with Seal Team Six for many years, DEV GRU, went over to CIA, special activities, super knowledgeable guy, sniper, lots of things. And Steve is not a professional speaker or writer, like Jocko. He's just a really good guy who defended the nation at the highest level for many years. And a lot of what he did, and given his high level of expertise, will be inspirational to us.

So what I've charged him with doing is telling us stories where we can be asking ourselves the question, "What do I do with that? What's the relevance of that to me?" It's going to be a spectacular program, I can tell you. I want to be respectful of everybody's time, we're just wrapping up. Open up your mics if you have a skill that you need us to deal with in any of these events that we're doing, or on the monthly coaching calls. Just let me know, and Dave and I'll make notes of them.

We're really good about researching things that we feel, well, we don't have expertise. And then, we'll try it out before we tell you anything. So, Rebecca, anything? Brian, anybody have any particular…? Ed, any skills that you'd love to see or hear more about at the live events or in these calls? And are there any questions on the tactical things? Dave and I are both here, and you guys can share with one another.

Steve: I'd like to add just one question…what was the Red Queen Hypothesis? Again, I know I remember hearing it before, but…

D. Frees: Sure. No, no, it's a good question. Dave, I'll give my version, and then you can kind of jump in. The Red Queen Hypothesis was originally articulated in evolutionary biology. And the idea was that as an environment changed, certain

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organisms either moved in that were better suited for that environment, or to the extent that they could, other organisms adapted. If they adopted faster they thrived, any less successful/adaptive organisms die out and the adaptive organisms take over.

And so, the main concept of the Red Queen Hypothesis is, if you're just standing still, you are by definition falling behind.

So if you've "cracked the code" and you've figured out how to do things, but the environment around you is changing and what people want from you is changing and your competition is changing, you are probably falling behind. And in this rapidly changing environment, you're probably falling behind fast. Why? Well, what people told you they wanted and what they wanted and how they wanted it delivered 6 months ago or 12 months ago, for sure, may not be anywhere in the ballpark of what they want and they need and they value now.

So the idea of the Red Queen Hypothesis (the expression originally came from a book, "Alice In Wonderland") is that you really need to be aware of what's going on around you. You need to make reasonably good predictions about the direction that's heading, and you need to be creative and place small bets. Or you're falling behind because your competition…or some new competition that never lived in the swamp, as the swamp dries out, maybe this new plant moves in and takes over.

Steve: Thank you.

D. Frees: Yes, thank you. Thank you, Steve. Hopefully, that helped. Great. But for us, for our purposes, Dave, do you have anything to add to that?

D. Weiman: Yeah. Whenever I notice that a competitor did something that I feel I should have done or thought about, that's when it impacts me. That's the, "Wait a

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second. What was I doing while they were thinking of something new," or, "while they were learning something new," or, "trying something new?"

D. Frees: And that's a good way of reframing a competitor's achievement where you've failed to, is not, "This was a failure," but rather, "How can I improve the improvement that they made? What can I do to make that even better? Because I can see that I should have thought of it, but I didn't."

D. Weiman: And you never know. In the natural environment, the proof is that something survives and thrives. I think in our environment, you never know… If another law firm borrowed a ton of money to do a lot of marketing of something, you don't know that it's actually succeeding for them. So, I always have this hesitation when I see a competitor doing something, that maybe that didn't work, maybe it failed for them, or maybe it feels like an idea that was from the 80s. I do try to be critical about that aspect of it, but it also means, what am I doing? What can I do differently?

How can I adapt? How can I offer something that's an enhancement of what I already have, or a different way of doing it? I don't mean going into a whole separate service area, but how can I enhance the things that I do to make them better?

D. Frees: I like that. I like it, it's a reframe. And probably on the strategic side, we did not talk about the idea of reframing. It's very powerful. So just to give you one more example before we go. Adopt a strategic mindset of reframing. Commit that you're going to engage in reframing whenever you detect a negative. When you hear yourself saying X is bad for me, change the frame to see how it might be good or empowering.

So to use Dr. Dave's example, there's not a defeatist attitude toward the thing that the competitor did. Likewise with iteration and innovation. When you find something that may even have initially negative effects but causes you to be more iterative, changing the frame around that from, "This was a catastrophe," to, "This caused me to rethink

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how I do things and to create powerful new solutions." This could be, for example, a complaint, or a bad review. Maybe they're wrong. Let's be open to that idea, but let's not just stop there with the inquiry. Maybe that person that gave you a bad review or a mediocre result of some kind is actually right.

They may be more sensitive to it, but there may be ways we can fix or improve this experience for everybody else. And we might never have known about it or fixed it without the complaint.

So reframing is super powerful. Use it anytime you have an initially negative reaction to something. People ask me all the time, "How do you stay so optimistic? How do you stay so energetic in the face of all these things that go wrong?" I mean, Dave can tell you that despite my outward optimism…which I think is truly part of me, I have, and my family has sustained enormous loss in the last couple of years. And it's been very hard, but I have found ways of reframing these losses and figuring out what the positive effects can be. And that's not denying reality, that's looking at it in a different way. Now I've heard other people say, "Oh, you're being Pollyanna-ish. And there really is a problem and you're not grappling with it." But I don't feel like that's what I'm describing here. So Dr. Dave, if you could make a little bit of a distinction I'd appreciate it.

D. Weiman: I think what David is talking about is getting in the ring with it, but it's sort of like… In the "Beverly Hillbillies," there was this famous episode where Grammy boxed his kangaroo. And there's something just funny about that in our own lives, to see the thing that's attacking us in that way.

So that's not denying it and saying, "Oh, everything's going to be better," and, "You're a winner." That's not it. But in so many of the circumstances that we've talked about… And everybody knows what Dave went through right before the mastermind group, because he was honest about it and he discussed it. You would also remember that there was great humor about that. And humor does a few things. First of all, it

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discharges the anxiety that we have. When we laugh, we then relax right away. Have you noticed that? After you laugh, you kind of feel good, and you feel a little settled down a little bit. But also, it invites other people in to look at it with you.

And so, that's how I've always felt about your approach to things. It's not that it wasn't taken seriously, but the humor is a way of inviting other people in to participate in it, and also to discharge some of that tension or anxiety around it. It's one of the reasons why when David is… I'll peel back the curtain a little bit. But if David makes you laugh, there's always a message that comes right after that. And that is to make you… So this pattern that we laugh a little bit, we relax, and then the information can get in.

D. Frees: So that ends the Dave Frees COVID storytelling happy hour, and that's the end of this report.

So congrats to everybody on the call for doing these coaching calls, because they do make a difference. We think that they're good because we're creating them. But I hope you guys know how much time and energy we spend trying to put them together and planning for them in advance and get topics that really going to make a difference for you. We appreciate your time throughout the whole year, and we're going to have really good content for you again next year, both at the virtual events, the live events and on these coaching calls and in the Business Black Ops Intelligence Briefing, which is killer good.

And there are presents coming to you guys. So you're going to get, for the December/January edition of the BBO Monthly Intelligence Briefing. You're also getting some really cool books and resources.

D. FREES & D. Weiman: Happy holidays!

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