

# DYNAMIC DIRECTIONS

## A BETTER LIFE AND PRACTICE

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ACHIEVE  
TURBO  
GROWTH!



# BE BULLISH ON LIFE

An 11-part audio series for financial advisors

PRESENTED BY TRAVIS CHANEY  
& DYNAMIC DIRECTIONS



**dynamicDIRECTIONS**<sup>®</sup>

Building a Better Life and Practice for Financial Advisors

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# NOW IS THE TIME FOR YOU TO SHIFT INTO TURBO GROWTH MODE

MEET  
YOUR  
GUIDES



**Travis Chaney**  
Program Author &  
Your Transformation Guide

Travis Chaney was six weeks away from being fired for poor performance when he made the life-altering decision to reinvent himself and turn his life and practice around. Eight years later, he was in the top 1.5% of his firm in overall production and found he was living the life of his dreams.

Travis embraced his "BULLISH ON LIFE" attitude and began sharing his formula for success with other advisors. Travis and his team will guide you step-by-step into your new life and practice!

## TURBO GROWTH IS...

Twice The Business. With Half The Clients. In 36 Months or Less.



**Randy Schwantz**  
Your host

Born and raised in west Texas, Randy Schwantz learned the basics of selling from his dad, who took his eight-year-old son along to call on his auto glass customers.

Randy's fascination with the sales process has positioned him to be a visionary, a best-selling author, and creator of The Wedge®. He guides The Wedge® Group on its mission to change the way advisors sell and help them achieve Turbo Growth. In demand as an author, speaker, trainer/coach and consultant, Randy is shaking up the sales training world with The Wedge®, the most complete sales acceleration system in the business for advisors who want to SHIFT INTO TURBO GROWTH MODE!

# HOW TO GET THE MOST OUT OF THIS PROGRAM

1. Listen to the entire program all the way through.
2. Go back and listen to each principle again. This time, as you are listening, pause the CD when Travis explains an exercise or asks you to think about questions he poses to you. Use the space provided in this manual to do the exercises and answer the questions. Complete every exercise and answer every question before moving on to step 3.
3. Come up with a written plan for all of the **BIG CHANGES** you are going to make in your life and practice.
4. Hire a coach or find a success partner...someone who will help you hold yourself accountable to your plan. **THIS IS CRITICAL IF YOU WANT TO ACHIEVE TURBO GROWTH!**
5. Start making those **BIG CHANGES** and enjoying those **BIG REWARDS**.

# AT THE END OF THE DAY, SEE YOUR LIFE THROUGH THE EYES OF A BULL

## — TAKEAWAYS —

- A positive attitude is contagious and reshapes your outlook on life.
- In life and business what you see is what you get.
- In the financial world we use terms like bull and bear market.
- Those who are bullish on the market believe the market is going up.
- Those who are bearish on the market believe the market is going down.
- If you are bullish on life, you have a positive attitude.
- If you are bearish on life, you have a negative attitude.

## — QUESTIONS —

1) As you look to the future, what do you see for your life and your business?

2) Are you bullish on life or are you bearish?

## — EXERCISE —

- Take a look at the Sample Outlook Journal Entries below in red.
- Every day for the next 2 weeks — every hour on the hour — rate your attitude on a scale of 1 to 10. 1 is an extremely bearish attitude. 10 is an extremely bullish attitude.
- At the end of each day, IN THE FOURTH COLUMN, make a list of the things you are grateful for in your life that helped you get bullish that day.
- Do this for two weeks and you will be amazed at the changes you will start to notice.

## — OUTLOOK JOURNAL —

Date	Time	My Outlook	Gratitude List
5/1	Noon	6	New Client
	1:00 PM	7	Delegated effectively twice
	2:00 PM	5	Remembered anniversary



— OUTLOOK JOURNAL —

Date

Time

My Outlook

Gratitude List

— OUTLOOK JOURNAL —

Date

Time

My Outlook

Gratitude List

# THE RIGHT PEOPLE EQUALS SUCCESS. THE WRONG PEOPLE EQUALS FAILURE.

## — TAKEAWAYS —

- When the storm clouds are gathering, you must turn to those who believe in you most.
- Your success will be determined in very large part by whom you decide to put by your side as you travel down the road of life. In other words, you become who you spend your time with.
- Facing fear is the most important part of the transformational process.
- Only your allegiance to fear gives it any power over you. With the help of the right people fear is something you will conquer every time it rears its ugly head.
- A HERO is a person of courage, the man of the hour, a lion heart, champion, and victor.
- A GURU is a person who can play the role of expert, sage, master, authority, pundit, leading light, or specialist in your life. Someone who can give you specific answers when you have specific questions about your life or business.
- A MENTOR is an advisor, guide or counselor who is motivated by a desire to see you succeed. In most cases, your mentors will not have a financial investment in your success. Obviously your boss or someone in your organization might be an exception. But even in cases where there is a business tie between you and your mentor, the primary currency the two of you will be trading is emotion, not money.
- A great COACH teaches you discipline and motivates you through a supreme amount of respect. A great coach is willing to give you tough love when you need it. A great coach is willing to push you further than you ever thought you could go while constantly reminding you how good you already are.
- CONFIDANTS are people who represent your closest friends and partners. Individuals you are willing to tell your darkest and most intimate secrets and know that you will be met with no judgement.

# THE RIGHT PEOPLE EQUALS SUCCESS. THE WRONG PEOPLE EQUALS FAILURE.

## — EXERCISE —

- Make a list of the people in your life who fit Travis's description of the "wrong people." Next to each name, describe your outlook on life while you are in the company of these people.
- Starting today, cut down to a bare minimum the time you spend with the wrong people you have identified.
- Compile a list of your Heroes, Gurus, Mentors, Coaches and Confidants.
- If you are missing people in a category, set a goal to fill up each unoccupied slot. You should have at least one person in each category.
- Now, get into action. Conjure up the courage to contact your list of Heroes, Gurus, Mentors, Coaches and Confidants. Ask them for help. Follow their advice.

## — WRONG PEOPLE —

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

— HEROES —

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

— GURUS —

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

— MENTORS —

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

— CONFIDANTS —

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_



## — COACHES —

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### REMINDER

#### Here's The Best Way To Get Into The Turbo Growth Fast Lane...

1. Listen to the entire program all the way through.
2. Go back and listen to each principle again. This time, as you are listening, pause the CD when Travis explains an exercise or asks you to think about questions he poses to you. Use the space provided in this manual to do the exercises and answer the questions. Complete every exercise and answer every question before moving on to step 3.
3. Come up with a written plan for all of the BIG CHANGES you are going to make in your life and practice.
4. Hire a coach or find a success partner...someone who will help you hold yourself accountable to your plan. **THIS IS CRITICAL IF YOU WANT TO ACHIEVE TURBO GROWTH!**
5. Start making those BIG CHANGES and enjoying those BIG REWARDS.

# WEAK COMMITMENTS LEAD TO STRONG REGRETS

## — TAKEAWAYS —

- Remember, we all have regrets.
- The shadow of regret grows darker the longer you put off making a commitment to your goals.
- Weak commitments get weaker over time.
- Eventually, weak commitments create crippling self-doubt in every aspect of your life.
- Keeping your regrets to yourself will sap you of energy and, over time, the regrets will grow.
- Talking about your regrets will free you up emotionally and keep you from repeating the mistakes that caused the regrets in the first place.

## — EXERCISE —

Answer these questions honestly:

1. What is your biggest regret in life?
  
  
  
  
  
  
  
  
  
  
2. What is your second biggest regret?
  
  
  
  
  
  
  
  
  
  
3. What is your third biggest regret?

- Now, it's time to identify the weak commitments that lead to the regrets. If you have regrets around your financial situation, you should be able to see that your commitments around learning to create wealth were weak. If you have regrets about your health, you'll probably notice that your commitments to diet and exercise have not always been what they could have been.

Based on the first exercise, list three commitments that were weak as you developed your regrets:

1. Weak commitment that lead to a regret:

2. Weak commitment that lead to a regret:

3. Weak commitment that lead to a regret:

- Even though you may have regrets, it is important to acknowledge your accomplishments as well. Keeping the things you are proud of to yourself will give you a warped sense of yourself and erode your self-confidence over time. Acknowledging your accomplishments will remind you of your strengths and help you focus on using them to propel your life forward.

Answer these questions honestly:

1. What are you most proud of in your life?

2. What else are you proud of?

3. What's one more thing you are proud of?

- The accomplishments you are proud of will help you identify areas of your life where making a commitment has come easy for you and you have put systems and structures into place that have supported you becoming completely committed. If you are proud of your marriage, you have made a strong commitment to honesty, trust and intimacy. You have also put structures into place that supported you spending time with your mate. If you are proud of your relationship with your children, you have made a strong commitment to setting an example for them and have created parenting systems that focus on fostering happiness, learning from mistakes and non-judgment.

Based on the first exercise, list three commitments that were strong as you accomplished the things that made you proud in your life:

1. Strong commitment that led to feeling proud of yourself:
2. Strong commitment that led to feeling proud of yourself:
3. Strong commitment that led to feeling proud of yourself:

## LOOKING AHEAD

### Questions of Consequence and Commitments

The questions on the next page will help you conduct a thorough check of your commitments and give you all of the information you need to identify where you need to make big changes in your life... if you want to embrace success and avoid regret!

## — QUESTIONS —

1. On a scale of 1 to 10, how committed are you to manifesting into your life the images and ideas that you created for your vision board? *(Remember Travis' story about Eddie? He wishes he was more truthful with himself. Don't repeat his mistake. Be honest.)*
2. If there are parts of your vision board where your commitment is less than 10, what are they and why is your commitment weak in those areas?
3. What do you think will happen to you and the people closest to you if you don't make changes in the areas of your vision where your commitment is not absolute?
4. What will happen to you and the relationships you value most if you don't achieve your vision?
5. If you don't keep your commitment to achieving your vision, how do you think you will you feel about yourself a year down the road?
6. On the other hand, what will happen to you and the relationships you value if you do achieve your vision?

7. If you do keep your commitment to achieving your vision, how do you think you will feel about yourself a year down the road?
  
8. What priority is living your vision to the fullest compared to the other activities in your life?
  
9. How will you eliminate the many distractions and obstacles that will crop up as you get more and more committed to your vision?
  
10. What kind of emotional and financial impact will not meeting your objectives have on your business and personal situation?
  
11. What kind of financial impact will accomplishing your vision have on your life, family and business?
  
12. Who else will you let down if you do not accomplish what you set out to do?
  
13. Who else will be proud of you if you do accomplish what you set out to do?



## — EXERCISE —

- In the space provided on the next page, make a list of all the commitments you currently have in your life.
- Assign a numerical score (between 1 & 10) to each commitment.
- A commitment that you rate as a 1 is something that you are not very committed to.
- A 10 would represent a total commitment.
- After you have made your list and rated it, let go of any commitments that scored 7 or less.
- Now, turn your full attention to your 8's, 9's, and 10's. Make it your life's mission to have those commitments dominate every waking moment.

Be careful of over-committing. Weak commitments always lead to strong regrets. Even if your reason for making a weak commitment seems justifiable to you, you will still feel regret down the road if you do not strengthen your commitment. The reasons for over-committing almost always seem justifiable, but the regrets still come...eventually.

# ARE YOU OVER-COMMITTED?

Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____
Commitment: _____	Score: _____

AVOID REGRETS!  
Let go of anything you scored 7 or less

# UNPRODUCTIVITIS AND OPEN LOOP SYNDROME WILL PARALYZE YOU

## — TAKEAWAYS —

- Unproductivitis is a condition caused by focusing on the wrong activities. Spending time on the wrong activities is like driving with your brakes on. You burn a lot of energy and move a lot slower than you otherwise would.
- Open Loop Syndrome is a form of analysis paralysis. It occurs when you have multiple big projects and pending decisions stuffed away in a dusty corner of your brain.
- Open Loop Syndrome and Unproductivitis are caused by an unwillingness to make solid decisions and finish projects due to lack of clarity and prioritization.
- Both conditions lead to stress, anxiety, little or no forward movement, and a massive decline in energy, resources and money.
- Advisors get frustrated most (and slip into Unproductivitis and Open Loop Syndrome) when they find themselves working on a project that is not suited for their strengths and passions.

## — EXERCISE —

### THE CURE FOR UNPRODUCTIVITIS

Use the Activity Journal for one week to keep a list of all of your daily activities.

At the end of the week, on your Activity Journal, assess each activity. If it was unproductive, circle **Yes**. If it was productive and moved you closer to your goals, circle **No**.

Use your Turbo Growth Delegation Sheet to make a list of all the activities you identified as unproductive (where you circled Yes) in your Activity Journal and immediately assign these tasks to a capable team member.

Set a specific date to have them completed, then hold yourself and your team member accountable.

— ACTIVITY JOURNAL —

Day of the week:

Date:

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

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Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

Activity: \_\_\_\_\_ Unproductive? YES/NO

— TURBO GROWTH DELEGATION SHEET —

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

## — TURBO GROWTH DELEGATION SHEET —

ActivityTeam Member Assigned to TaskCompletion Date

Comments:

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Comments:		

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

<u>Activity</u>	<u>Team Member Assigned to Task</u>	<u>Completion Date</u>
Comments:		

## — EXERCISE —

### THE CURE FOR OPEN LOOP SYNDROME

Make a list of all of the open loops that are occupying head space for you right now.

Identify which Open loops must be closed by you and which Open Loops can be delegated.

For each open loop, sketch out a quick plan to close the loop and set a deadline to do it.

Budget one hour a day to close down the open loops that only you can close.

Budget another hour a day to educate your staff to close down the remaining open loops.

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
<u>Quick Plan for closing open loop</u>		

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
<u>Quick Plan for closing open loop</u>		

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
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<u>Quick Plan for closing open loop</u>		

Open Loop

Who will close this loop?

Completion Date

Quick Plan for closing open loop

Open Loop

Who will close this loop?

Completion Date

Quick Plan for closing open loop

Open Loop

Who will close this loop?

Completion Date

Quick Plan for closing open loop

Open Loop

Who will close this loop?

Completion Date

Quick Plan for closing open loop

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
<u>Quick Plan for closing open loop</u>		

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
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<u>Quick Plan for closing open loop</u>		

<u>Open Loop</u>	<u>Who will close this loop?</u>	<u>Completion Date</u>
<u>Quick Plan for closing open loop</u>		

# WHATEVER YOU DO, DON'T LEAVE THE LESSONS BEHIND

## — TAKEAWAYS —

- If you want different results in your life break away from the sins of insanity which are thinking, believing, and doing the same thing over and over and expecting different results.
- A different result requires different beliefs and different actions.
- When you extract the lessons from failure for future application, the learning travels with you, safely stored until the next moment you need to draw from that experience.
- Extracting the lessons from your failures keeps you from falling off a cliff into a pit of insanity.
- Don't be afraid to appear vulnerable by sharing past failures.
- Remember, experiments never fail as long as you extract the lessons from the miscues.
- Remember to never leave the lessons behind.

## REMINDER

Failures show us what needs improving.  
Without failures, how would we know what to work on?

— EXERCISE —

BRINGING THE PERSONAL LESSONS FORWARD

List the 3 biggest failures you have had in your PERSONAL LIFE.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Now, list the 2 biggest lessons that you learned from each of the failures.

Lessons from Personal Failure #1:

1. \_\_\_\_\_

2. \_\_\_\_\_

Lessons from Personal Failure #2:

1. \_\_\_\_\_

2. \_\_\_\_\_

Lessons from Personal Failure #3:

1. \_\_\_\_\_

2. \_\_\_\_\_

If you could do it over again, briefly describe how you would handle the situation that lead to each of the personal failures differently?

Personal Failure #1 - How I would handle it differently

Personal Failure #2 - How I would handle it differently

Personal Failure #3 - How I would handle it differently

Never stop trying to right a wrong. If you can, go back and re-attempt that which lead you to your personal failures.  
Apply the lessons you have learned...  
and Turbo Growth will be yours for the taking!



— EXERCISE —

## BRINGING THE BUSINESS LESSONS FORWARD

List the 3 biggest failures you have had in your BUSINESS LIFE.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Now, list the 2 biggest lessons that you learned from each of the failures.

Lessons from Business Failure #1:

1. \_\_\_\_\_

2. \_\_\_\_\_

Lessons from Business Failure #2:

1. \_\_\_\_\_

2. \_\_\_\_\_

Lessons from Business Failure #3:

1. \_\_\_\_\_

2. \_\_\_\_\_

If you could do it over again, briefly describe how you would handle the situation that lead to each of the business failures differently?

Business Failure #1 - How I would handle it differently

Business Failure #2 - How I would handle it differently

Business Failure #3 - How I would handle it differently

Never stop trying to right a wrong. If you can, go back and re-attempt that which lead you to your business failures.  
Apply the lessons you have learned...  
and Turbo Growth will be yours for the taking!

# IF YOU WANT A CLEAR FUTURE, USE A SHARP PENCIL TO SCRIPT YOUR VISION

## — TAKEAWAYS —

- Clarity comes when you articulate what you want in writing and images.
- Your magic happens when your thoughts race from your head, down through the pencil and to the paper.
- The pencil brings clarity to the thousands of thoughts that go through your mind daily.
- The sharpness symbolizes what you specifically want out of life and business.

## — EXERCISE —

- Answer the two questions on the next page.
- Answering them truthfully will help you identify your values...the things that are really important to you in life.
- Consider things like your career, physical environments, material possessions, family and friends, significant others and romance, fun, recreation, health, money, and personal growth.
- Keep your answers to one or two words.
- PUT SOME SERIOUS THOUGHT INTO THESE ANSWERS — YOU WILL USE THEM TO CREATE YOUR VISION BOARD!

What is important to me that I am paying  
EXCELLENT attention to?

What is important to me that I am NOT  
PAYING ENOUGH attention to?

## — EXERCISE —

- Find or create images that represent you fully honoring the values you identified in step 1. For example, if health is a value of yours, find an image that represents perfect health to you. Maybe an athlete running, a yoga master posing or a martial artist fighting. If family is a big value of yours, take a picture of yourself with your family relaxing or having fun.
- On the Vision Board worksheet provided in this manual, paste your images in the boxes in the center of the pages.
- Below the image, name it and identify the value that you will be honoring when you achieve the specific part of your vision that the image represents.
- Put all of your Vision Board worksheets on one big board so that your images are consolidated into one spot.
- Put your vision board in a place where you and other people who believe in you can see it.
- Study your Vision Board for at least 60 seconds twice a day.
- E-mail a photo of your vision board to Travis at [TravisChaney@DynamicDirections-D2.com](mailto:TravisChaney@DynamicDirections-D2.com) or fax it to him at (270) 926 0908.
- In return for doing this, you will receive an e-mail from Travis with his thoughts and comments on your vision board as well as a FREE gift worth \$50.

NOTHING will propel you toward Turbo  
Growth faster than creating a Vision Board.

START TODAY!!!!!!!

— VISION BOARD —

NAME:

PAGE:

DATE:

NOTE:



IMAGE:  
VALUE:

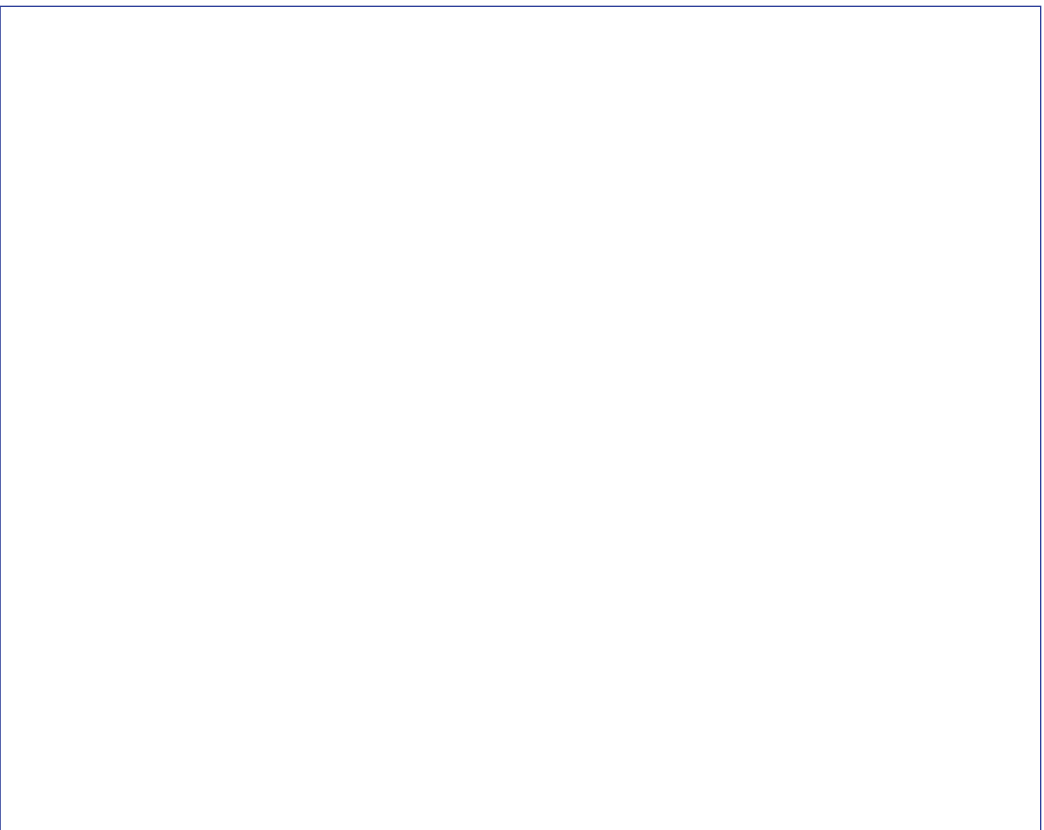


IMAGE:  
VALUE:

— VISION BOARD —

NAME:

PAGE:

DATE:

NOTE:

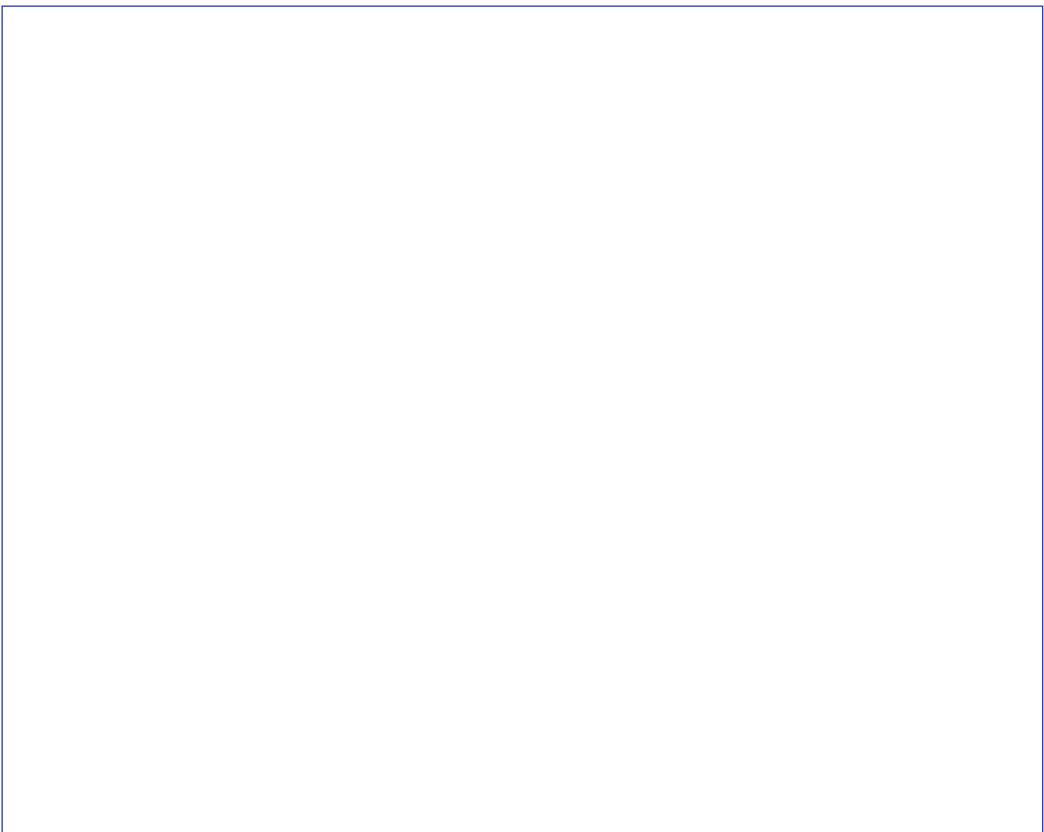
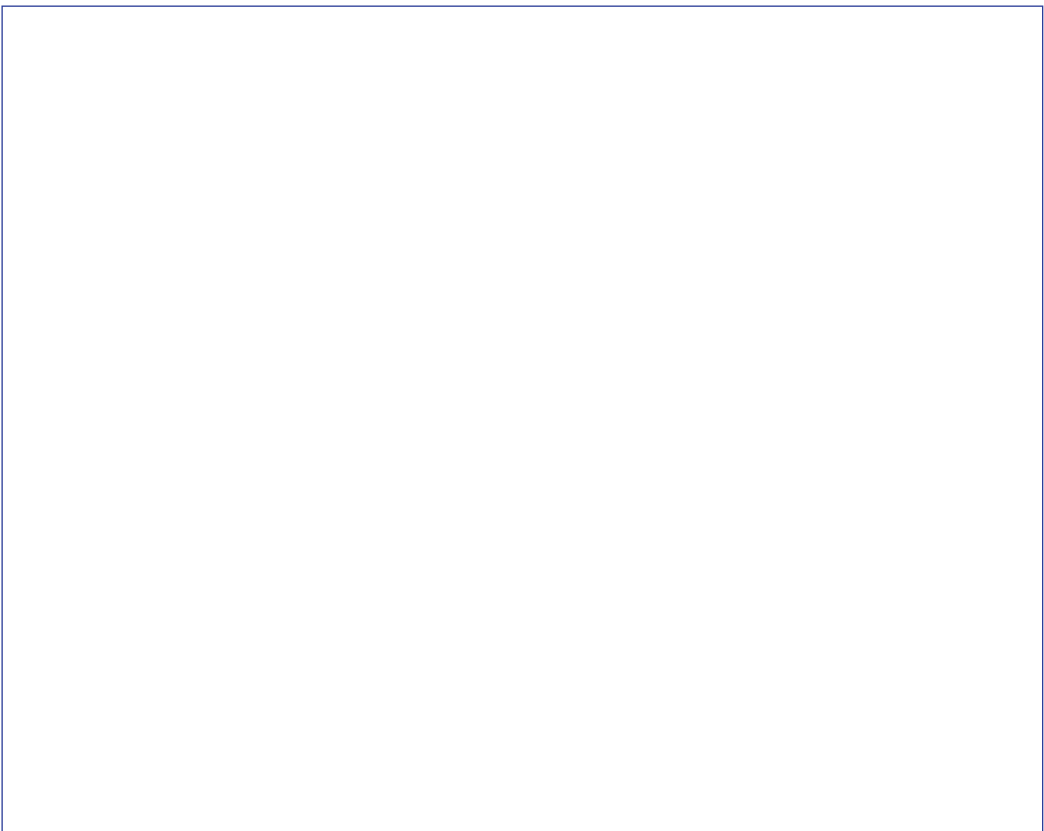


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— VISION BOARD —

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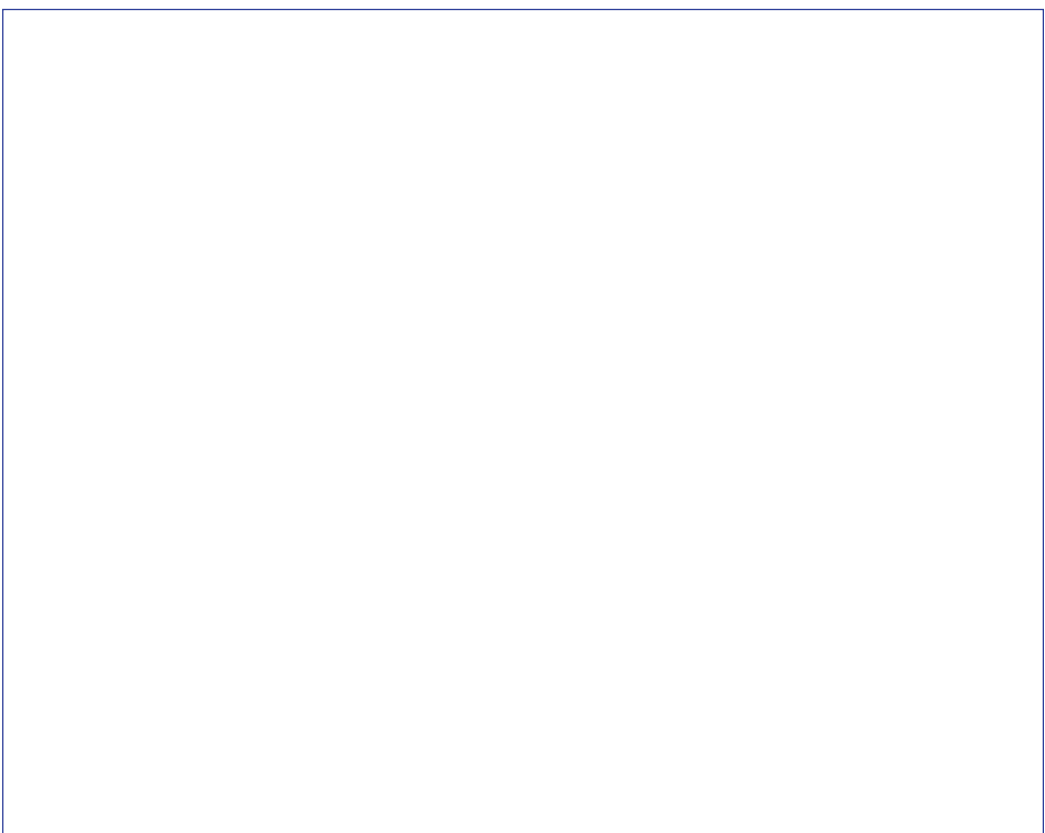
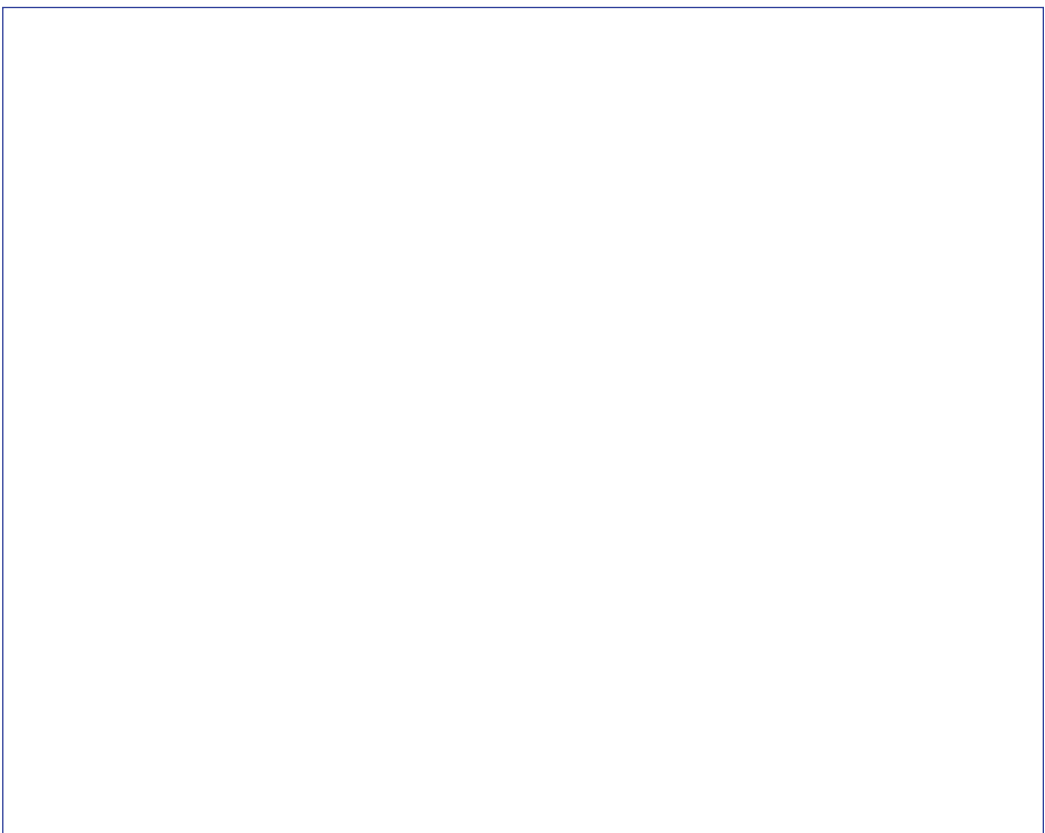


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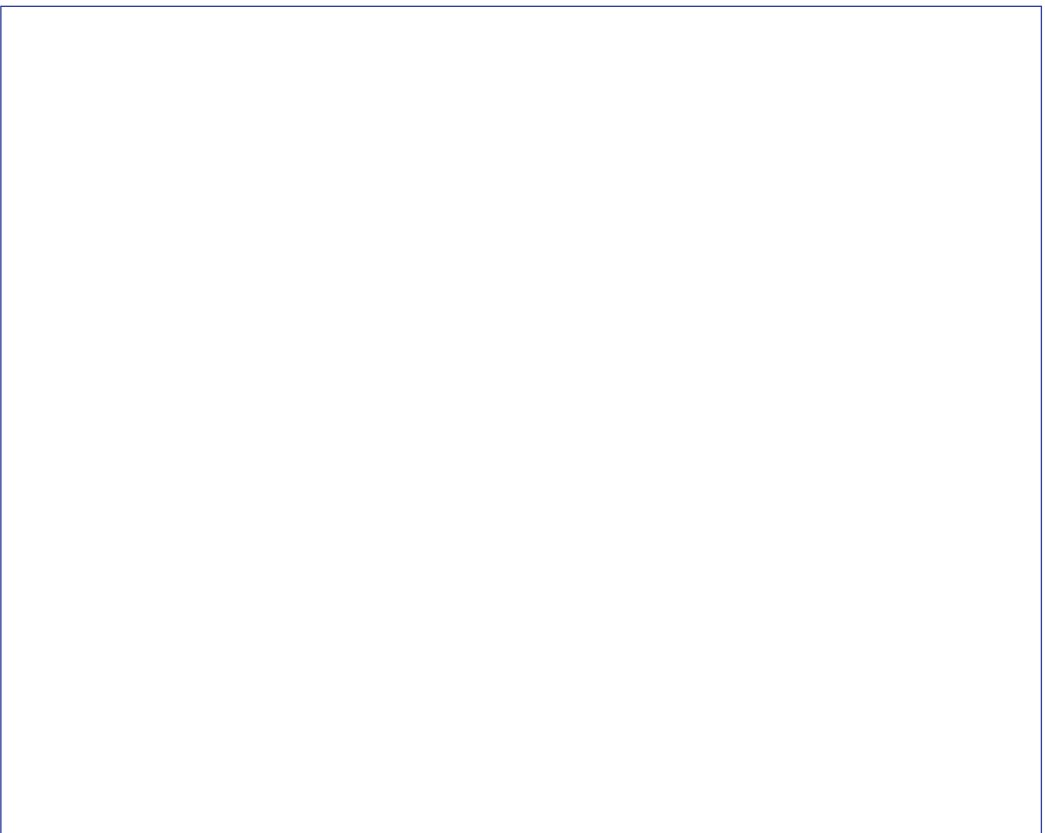


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— VISION BOARD —

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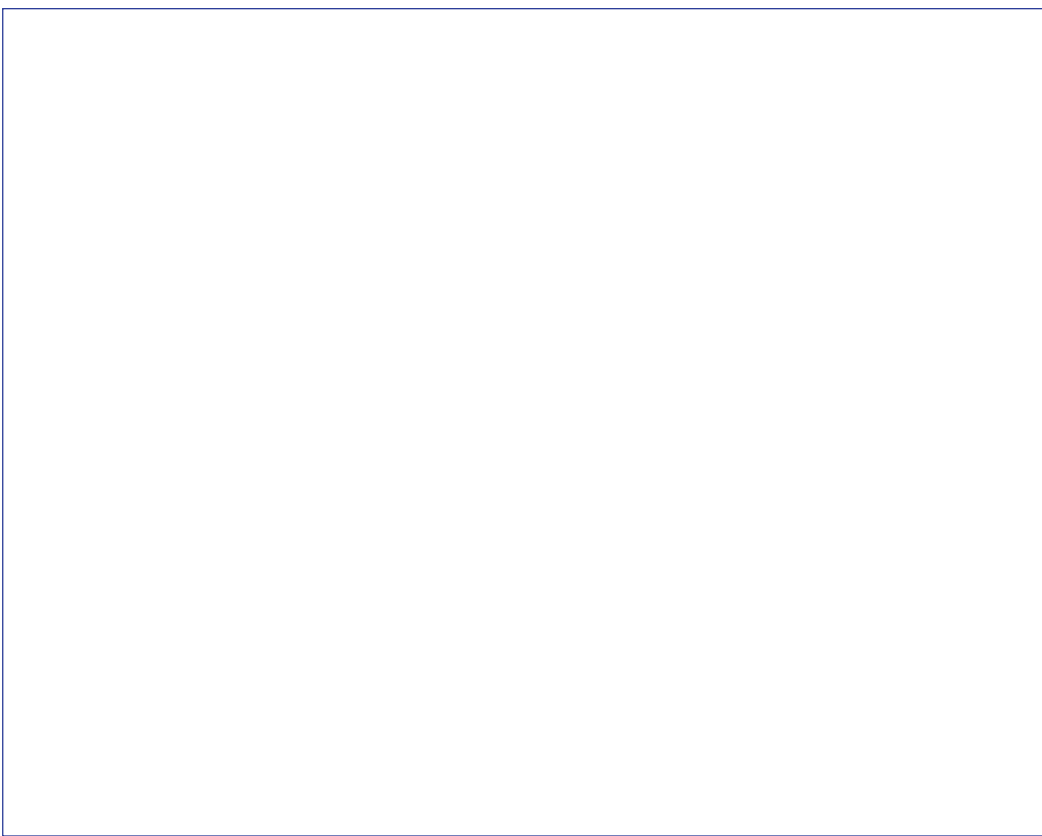
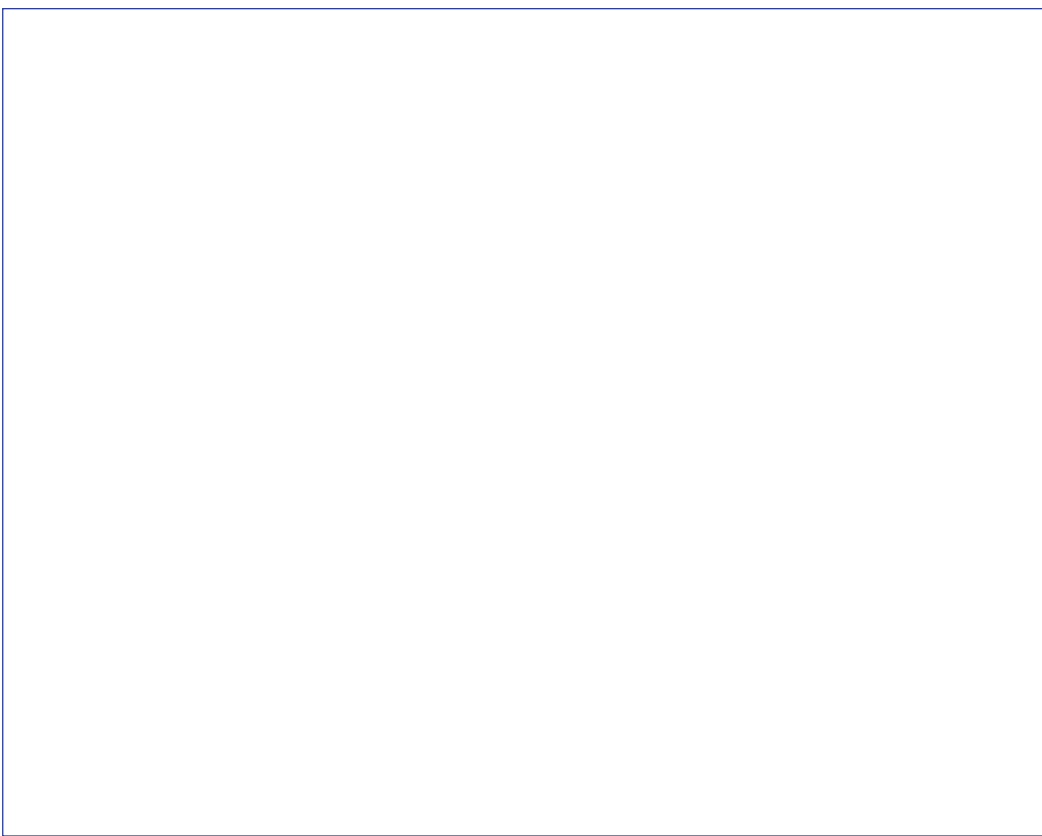


IMAGE:  
VALUE:

IMAGE:  
VALUE:

# THE ROAD TO SUCCESS IS PAVED WITH A MIXTURE OF PASSION & PRODUCTIVITY

## — TAKEAWAYS —

### Passion + Productivity = Significance

- When you hit your passion and productivity button at the same time, smiles, revenue and profits soar.
- The pains of not living in passionate and productive bliss can result in a life financially and emotionally bankrupt.
- With an emphasis on no passion and high productivity you will experience elevated profits and an empty existence with no purpose.
- With all passion and no productivity, you may enjoy life but will probably end up poor and destitute lacking the financial means necessary to continue your joys through out your entire life span.
- Too much productivity and not enough passion will also suppress what is important to you making it extremely difficult to connect the wealth you create to what you truly value in life.

## — EXERCISE —

### Finding And Building Your Passion

- List 30 accomplishments you have had over the last 90 days. (Remember, these accomplishments do not necessarily need to be large although they may be. They can be as small as turning an acquaintance into a new client, implementing a new system in your business, or helping a client discover they can achieve a financial goal.)
- Don't think too hard about it. Just write. And don't stop writing until you have at least 30 accomplishments listed...no matter how small they may seem.





Review your Accomplishments List and answer these questions:

1. What did you do that brought a big smile to your face?

2. What did you do that made you feel good about your existence in the business world and made you say: "I know why I exist now!"

3. What activities do you want to repeat over and over?

- The answers to these questions will give you some insight into the activities you are passionate about. To build your passion, practice engaging in these activities daily.
- Use the space on the next page to write up an action plan to spend at least 30 minutes a day over the next 30 days engaging in the passion-building activities you identified in this exercise.
- Follow your plan.





# LEAD WITH HARMONY AND PEOPLE WILL WANT TO DANCE WITH YOU

## — TAKEAWAYS —

- Whatever mental energy you exude, whether you know it or not, affects everyone around you in a positive or negative way.
- Good mood inspires high spirits and positive energy. Bad mood inspires broken spirits and negative energy in those around you.
- If you want to expand your capacity and achieve turbo growth, you won't be able to do it alone.
- The messages you send must motivate your team to be in harmony with you and your vision.

## — QUESTIONS —

1. What happens to the people around you when you are a good mood?

2. What happens to the people around you when you are in a bad mood?

## — EXERCISE —

- Cut out the questionnaire below, copy it and hand it out to the people who work for you.
- Also, ask the 3 people who know you best to fill it out.
- To relieve any concern people may have about hurting your feelings, find a way to have them complete the questionnaire and return it to you anonymously.
- Tabulate your average score to each question.
- Any average score under 4 is an area where your leadership needs work.
- Find a Mentor or Coach who can help interpret your scores and hone your leadership skills where they are weak.

Thanks for agreeing to fill out this questionnaire. It should only take 60 seconds or so for you to complete it. I'm committed to becoming a better leader. And, I need some feedback from people I trust so I know where to start making some positive changes. So, please, be totally honest in your responses.

**Ratings:** 1 = Strongly Disagree 2 = Disagree 3 = Undecided 4 = Agree 5 = Strongly Agree

I care passionately about everyone's success \_\_\_\_\_

I come back quickly from mistakes and failures \_\_\_\_\_

I stay cool and calm when under pressure \_\_\_\_\_

I am honest and trustworthy \_\_\_\_\_

I take the time to listen \_\_\_\_\_

I know what to say when someone is having a hard time \_\_\_\_\_

I am a team player \_\_\_\_\_

I am fair and objective when dealing with problems \_\_\_\_\_

*I want to respect your privacy. If you would like to remain anonymous with regard to this questionnaire, let's talk about a way for you to get it to me that respects your boundaries...before you fill it out.*



4. If you suggest an investment to a client, do you own that investment? If no, why not?

5. If you ran a financial analysis on yourself, would the results show that you fit The Ideal Client Profile for your practice? If no, why not?

## — EXERCISE —

- Run a comprehensive financial review on yourself and your business.
- Show your analysis to a friend or mentor who understands finance to keep yourself honest.
- With your friend or mentor's help, assess where you are over-exposed to risk and under-diversified.
- Write a plan to make appropriate risk and diversification adjustments.
- Implement your plan within the next 90 days.

# WHEN IT COMES TO MONEY... MAKE IT. GROW IT. PLAY WITH IT AND GIVE IT AWAY!

## — TAKEAWAYS —

- Significance equals legacy, impact and purpose.
- Significance is not about making a contribution financially.
- Contrary to popular opinion among people who don't have a lot of money, money is not the root of all evil.
- Money is a way of communicating value.
- The more value you bring, the more dollars you will yield.
- The choices you make on how to allocate your money reflects what is most important to you.
- Make sure you are taking the medicine you are prescribing to your clients. Affluent discerning clients are attracted to advisors who have the same habits as them.
- As you move forward financially identify additional ways you can make money, grow it, spend it, and give it away...all at the same time.

## — QUESTIONS —

Use the questions on the next page to expand your thinking around the concept of contribution. It does not always have to involve money. Contributions can be made in lots of different ways and can have a positive impact on individuals, families, communities, our environment and the world at large. Take some time to think about your answers to these questions before you move on to the exercise that follows.



— EXERCISE —

Identify 10 contributions you want to make that will have you approach the end of your life with a sense of pride around the legacy you will leave.

Contribution #1: \_\_\_\_\_

Contribution #2: \_\_\_\_\_

Contribution #3: \_\_\_\_\_

Contribution #4: \_\_\_\_\_

Contribution #5: \_\_\_\_\_

Contribution #6: \_\_\_\_\_

Contribution #7: \_\_\_\_\_

Contribution #8: \_\_\_\_\_

Contribution #9: \_\_\_\_\_

Contribution #10: \_\_\_\_\_

Share your list with a confidant.

# SMALL CHANGE IS FOR WIMPS. BIG CHANGE IS FOR WINNERS!!!

## — TAKEAWAYS —

- To get from where you are now to the life you are destined to lead, small steps and small changes won't work, you need to take big giant leaps and make big scary changes.
- Incremental change won't get you where you need to go as fast as you want to get there
- Stop listening to the small thinkers who preach the benefits of a small life.
- If you want your life and business to bring you true fulfillment, joy and abundance, you need to change your whole way of looking at life and living life.
- Money is just a statistic and a statistic will not motivate you.
- Look to your vision board and dream about what's possible for you. That vision of your future is what is going to drive you to embrace long term, sustained, positive change.
- It's your values, not your bank account balance, that will drive you forward as you come up against the fears, uncertainties and obstacles that always accompany big change.
- Become somebody who has the courage and conviction to set up financial plans for people that allow them to live in security, in comfort, and with the financial resources they need to achieve their dreams.
- You have everything you need to transform your life and your business. The next step is up to you. Take it. Get moving.





# IF YOU WANT TURBO GROWTH, YOU NEED REASONS TO GO GET IT!

Write down 10 reasons why you want Turbo Growth in your life and practice.

Reason #1: \_\_\_\_\_

Reason #2: \_\_\_\_\_

Reason #3: \_\_\_\_\_

Reason#4: \_\_\_\_\_

Reason #5: \_\_\_\_\_

Reason #6: \_\_\_\_\_

Reason #7: \_\_\_\_\_

Reason #8: \_\_\_\_\_

Reason #9: \_\_\_\_\_

Reason #10: \_\_\_\_\_

# IF YOU WANT TURBO GROWTH, YOU NEED TO MAKE BIG CHANGES...

Write down 10 Big Changes you are willing to make over the next 90 days to get yourself into the Turbo Growth Fast Lane of Life.

Big Change #1: \_\_\_\_\_

Big Change #2: \_\_\_\_\_

Big Change #3: \_\_\_\_\_

Big Change #4: \_\_\_\_\_

Big Change #5: \_\_\_\_\_

Big Change #6: \_\_\_\_\_

Big Change #7: \_\_\_\_\_

Big Change #8: \_\_\_\_\_

Big Change #9: \_\_\_\_\_

Big Change #10: \_\_\_\_\_

