**MMM 15-11-2023 - Video\_Transcription**

[Jake] (5:29 - 5:38)

Hello. Hi, Greg. Hi, Natalie.

How are you?

[attendee] (5:39 - 5:40)

I'm okay. How are you?

[Jake] (5:40 - 5:43)

Not too bad. Thank you. Thank you.

Good.

[attendee] (5:46 - 5:48)

How are you getting on with your headline strategy in the year of?

[Greg] (5:50 - 6:55)

Well, actually, pretty good. Well, I want to say pretty good. Rupin shared with us his presentation with some of us.

And I've basically started from the end, but working backwards. So I've started with the presentation and I'm better than I thought. So I've just basically put everything as, you know, as a live stream.

So basically put everything into, you know, on the presentation and just start filling the gaps. And it works better for me, if that makes sense. Yeah.

And also concentrates on the 70, 20 and 10. After talking to Rupin, how to structure my focus. So not only on the 20 and 10, but actually, well, the 70% tasks and objectives should take majority of your time.

And the 20 and 10 should be easier. I hope I've explained as well.

[attendee] (6:55 - 6:57)

Yeah. Yeah. Yeah.

That makes sense. Yeah.

[Greg] (6:58 - 7:23)

I've got two businesses and also my development and also the headline strategy for next year. And I'm like, I'm doing it. And when I do my cave time, I'm like, is this the right?

Is this what I want? Is that what I want? And I don't know.

But yeah, it's not easy.

[attendee] (7:24 - 7:28)

So you keep questioning if it's what you want. Is that what you mean?

[Greg] (7:28 - 8:12)

I think exactly. So I've never, ever done brain dump before. And it was difficult to start with.

But then I'm like, OK, whatever comes to my mind, let's just let's just do it. Let's just put it on. And because I'm starting with the presentation, it's just easy to put it on and then get rid of it.

And then I'm going through my back again through lessons learned and just trying to streamline it. And the more I go back to it and looking at what I've done, I change things. And yeah, it's just questioning.

Is this what I want? Is that the headline strategy for next year? And although the headline is there, it's more of a like the objectives, what I want to get out of it.

[Brief acknowledgments] (8:12 - 8:12)

Yeah.

[Greg] (8:13 - 8:13)

Yeah.

[Brief acknowledgments] (8:13 - 8:18)

Yeah. Same as same as me as well. Actually, that's good.

[Greg] (8:19 - 8:50)

Ashley, man, I just want to say big thank you to you. Thank you so much for helping me. You're all right, mate.

You're OK, yeah? Yeah. How you doing?

Yeah, I'm good, thank you. Yeah. Not too bad.

Not too bad. It's just that, yeah, with the risks, with the ramps that you, you know, you helped me out. You know, it's just you saved me so much time.

Because last time I've written down risk assessments. Got it. 48 hours.

It took me literally and it still wasn't super perfect.

[Ashley Gray] (8:50 - 9:02)

So great. If you ever need it again, like I said, give me a shout. I'm more than happy to help you with that.

Thanks so much. How are we all anyway? We all OK?

[Grant] (9:05 - 9:11)

I shall. I'm wonderful. Fantastic.

Top of the world.

[Natalie] (9:14 - 9:18)

How's everyone else? All good. Very good.

[Gareth Morgan] (9:19 - 9:21)

All good here as well.

[Natalie] (9:21 - 9:22)

Very good.

[Bianca / Admin voice] (9:23 - 9:23)

Hi, everybody.

[Grant] (9:27 - 9:28)

Just having my lunch.

[Jake] (9:29 - 9:30)

Enjoy. Anything good?

[Grant] (9:32 - 9:34)

Smoked salmon, boiled eggs and avocado.

[Greg] (9:35 - 9:46)

Well, we are trialling out the prep kitchen, actually. So this week we've had the big box delivered and the food looks nicer than what I have anticipated.

[Josh Keegan] (9:47 - 9:59)

Did you use my code, Greg? Hello? Did you use my discount code?

Shall I? Well, I expect to see £10 in my prep kitchen account. Or did you go ahead without it?

[Greg] (10:00 - 10:07)

No, I just go ahead and I order it. It must have been like, you know, from my mobile. So no, I need to use my discount code this time.

[Josh Keegan] (10:08 - 10:27)

That could have given us both £10. That's where you got your first few meals for free. That's all right.

Don't worry. I'll cancel my subscription and resubscribe. That sounds good.

And then you share me your code. Then I'll resubscribe again. We'll get loads of money.

It's a scheme, isn't it? We just keep doing it all year.

[Greg] (10:29 - 10:37)

Josh, how do we secure this one-to-one mentoring? Because I'm not sure if I missed the memo or it was just one of those blackout moments.

[Josh Keegan] (10:39 - 10:44)

I don't know what the blackout moment is, but I think you might just missed the post in the Facebook group.

[Grant] (10:44 - 10:55)

Hey Greg, you can go instead of me if you like. I went last time. If you want to take my spot, you're more than welcome to.

And is this happening after the call or is this happening during the call?

[Josh Keegan] (10:55 - 12:06)

It happens a few days before the call. So in the Facebook group, there's a post a few days before the call. And basically, you just pop in there that you want to slot and then what your topic is.

And then basically, Bianca creates a list. Now, what we are trying to do is obviously give people the opportunity because everybody that's booked on, well, I think two of the people that booked on this time also booked on last time. But to be fair, although we want to give everyone the opportunity, fair play to you guys for making the most of it.

So I'd say, yeah, if you want to slot Greg, you can have one because Grant's very kindly said that he was on last time. So you happily give it up. But yeah, I'd say for everybody that wants to make the most of these sessions with myself and Adam, so we do it alternate months, check in the Facebook group.

You can just put it in your diary on the Monday of the middle week of the month. Just check it out and just add on there what you want and then you can add it in. Alternatively, though, if you do want one for next month, message Bianca, put it onto that post now and then you can book a slot for next month as well.

As far advanced as you want. Thank you. And before we dive in to some mentoring, just a bit of a show of hands.

How are we doing? Who's flying at the moment?

[Natalie] (12:09 - 12:19)

I've got a share if you want, a positive share. Can you hear me? Shall I give you a positive share?

[Josh Keegan] (12:20 - 12:25)

Yeah, my screen's got a bit laggy. Yeah, go on. Whoever's got the share.

Yeah, positive share sounds good.

[Natalie] (12:25 - 12:31)

Yeah. I slept right through for the first time in about five years last night.

[Josh Keegan] (12:31 - 12:41)

Wow. And what was the catalyst about, do you think? What caused that?

What do you think happened there? Why did that happen?

[Natalie] (12:41 - 13:20)

I've just changed loads of different things. The morning bit is fine. I always get up at the same time anyway.

It's kind of more relaxation during the day. Let's have a very strict sort of like hour before bedtime routine, more meditation, increased water, lots and lots and lots and lots of things. And just really toning down my stress.

I think that's really helped. And just being kind of quite, you know, I wouldn't say selfish. That's not the right word.

Just being my well-being is top of the list.

[Josh Keegan] (13:21 - 13:22)

So that's it. Congratulations.

[Natalie] (13:22 - 13:34)

Yeah, making sure I'm out and, you know, doing my steps outside. You know, exercise is not a problem for me, but yeah. So it's just making sure I stuff like during the day I'm outside.

[Josh Keegan] (13:36 - 13:40)

Should we do a little virtual round of applause for Sian for achieving that?

[Natalie] (13:40 - 13:44)

Yeah, that's good. Thanks. That was one of my objectives.

[Josh Keegan] (13:45 - 13:59)

Who's finding their habits? They're already starting to see like, you know, we're about a week or so into habits now, you know, a little bit longer. Who's starting to see some serious benefits from actually having these things in their diary and making these things happen every day?

Definitely.

[attendee] (14:00 - 14:04)

Yeah, I can see the opposite effect when I don't. Does that count?

[Josh Keegan] (14:05 - 14:29)

Yeah, that does. That does. I was listening to a podcast earlier this morning where like one of the points was you don't realize until you start to feel really good, you don't realize how bad you necessarily felt.

For me personally, like it's been massive. It's been, yeah, it's been just been, we use the term game changer a lot, but it's just like just getting me back into that right, right place. And it's yeah, this is first year for a while where I've just been, I've just been nailing them.

[attendee] (14:29 - 14:42)

I think when you don't follow them and you notice how the sort of negative impacts of that, you soon jump back into doing the habits. Does that make sense? Yeah.

Yeah.

[Josh Keegan] (14:42 - 14:47)

Does anyone want to admit to totally falling off the wagon with their habits? Has anybody like literally gone totally off the rails?

[Carol] (14:49 - 14:56)

Yeah. Sunday, Monday and Tuesday, I'm only going to be honest, totally off the wall. Yeah.

[Ashley Gray] (14:57 - 15:03)

Me, I'm not just one of the habits, which is probably the most important. I'm not doing too good.

[Josh Keegan] (15:04 - 15:48)

So that, I mean, it's really important to be honest. So I think one of the things I say to you guys that if you're struggling to make them happen, either you just need to do it or your habits are not easy enough and you want to make them easier. So these are things that you can do.

This is one of the challenges. And we say it time and time again, but to actually get this lesson through to people and get people to listen, when you're all entrepreneurs, you've got a thousand miles an hour. Like we say to a blue in the face, I make one of your habits, brushing your teeth.

Don't make it a cold plunge for an hour a day. But as entrepreneurs, you want to do all this crazy, crazy stuff. And all that happens is we don't hit it.

So if you guys literally are struggling and you're not doing it right and you've fallen off the wagon and I think Ashley's fallen off the wagon a little bit, then you want to just simplify them and make them easy.

[Carol] (15:49 - 16:12)

Yeah. I've only fallen off the wagon in my steps. That's all.

I had my dog on Sunday and this little doggy would talk to you. She's like a human. It's destroyed our lives because I thought she was dying in my arms on Sunday.

So it's like veterinary hospital and just monitoring her 24 seven in case she has another seizure. So look, that's why.

[Josh Keegan] (16:12 - 16:30)

And sometimes they'll admit a game, but like maybe just for you, rather than you feel like you're failing, set a new habit. Say, right, just a 10 minute walk at lunchtime. Just create an easier habit that we know we're going to achieve rather than feeling like we're missing stuff.

It's like life's changed. Things have got in the way. Make it easy.

Gareth's got his hand up. Come on Gareth.

[Gareth Morgan] (16:31 - 17:33)

Hi Josh. Yeah, everyone. Yeah, I think it depends on how hard the habits are that you've set for yourself.

If you've set 10 minutes of walking or something like that, then you are, or if you set in really challenging ones, you're going to then, it's going to be difficult because you're not, it's not just like setting yourself one new habit challenge for the whole month. You're doing five. I'm finding it difficult to do all five every day because I've set the bar for me quite high.

And so it's okay, but I'm ticking every day. But then if it's across, then I'm just labeling the number so I can see which one of the habits over the course of the month has been most difficult. For me, the hardest one is shifting the day.

I've tried. I'm trying to go to bed earlier to wake up earlier and I'm just, that's the one I'm struggling with. I'm doing the nighttime routine well, but it's just trying to shift my body clock a little bit.

I'm finding that quite difficult. So I think it's okay to fail as long as you're trying. I think that's important.

[Josh Keegan] (17:34 - 18:29)

Yeah, I think it's okay to fail as long as you're trying. And this is the trial month and we're going to be formalizing them for next month. But the key is like, for example, your example there, Gareth, like if you try for a month to make this happen and it doesn't, and it just doesn't happen for whatever reason, let's reset that habit of what we actually try to achieve.

And maybe it's just bedtime 15 minutes earlier, or maybe it's just no screens before bed, like just focus on what's actually important and create something that we can actually achieve. And then we layer on the habits as we go. So we want to make sure, because remember, these are the basics for high performance.

These are things we've got to maintain no matter what, when we get into winter, spring, summer, championship season. So we want to make sure that we are really clear on the things that actually matter to us now. And we really use this as an opportunity to lock them in.

But by the time we get to the next month, these are all things that are just the fundamentals of our day. And they just have to happen no matter what. Andy's raised his hand.

Go on, Andy.

[Andy] (18:30 - 19:19)

Yeah, just for a share, this is my habits board that basically, like I mentioned, I have different colors. So basically, I have different ticks throughout the day. So basically, like that day, I didn't actually wake up early, but I'm still trying to adjust my time.

I wake up like 4 o'clock this morning. So it's still 1.20. But the thing is, is trying to remind yourself what time you sleep or what things that you haven't done, and then adjust it. So that sleep by, it was 10.30 before. But now it's like 11 o'clock, because I struggled. So it's just adjust it over time. I remember Josh or Adam mentioned, shoot for the moon, don't shoot for the star.

So just go, not make it too hard for yourself.

[Josh Keegan] (19:20 - 19:59)

Yeah, cool. With just a couple more minutes on the habits, we'll dive into mid-month mentoring. And I totally agree.

So one of my habits was read my daughter for 20 minutes a day. So she's been down to make sure we read books again for 20 minutes a day. In reality, it's me sitting there reading while she throws balls at me, runs around the room.

And I'm just like, what am I actually getting out of this? So I'm going to shorten it to five minutes, actually sit down. She sits on my lap, we read a book, as opposed to me just sitting there reading her Peppa Pig books while she just runs all over the place.

So it's just tuning into and just making it simple and making it happen. Go on, Pat. We'll speak to you, Pat, and then we'll dive into mid-month mentoring.

[Pat] (19:59 - 20:28)

Yeah, no, I think it's really good to hear everyone's tips. A book that really helped me was a David Garvin's book, You Might Not Be Everyone's Taste. But he talks about callus in the mind.

And it's like every time you do a habit and you succeed, you've callused your mind. It's like playing the guitar. It hurts.

And you build calluses. And it's easier and easier every time you do it. And so it's like the start is the hardest bit, basically.

And then you callus your mind, as David Garvin's put it.

[Brief acknowledgments] (20:30 - 20:30)

Nice.

[Josh Keegan] (20:30 - 20:41)

Yeah, absolutely. Just building this muscle. And that's what we're trying to do this month, so that the next month, these are locked in.

We can make them happen. Jake has just asked what book it is. I'm assuming it's Can't Hurt Me by David Garvin.

[Pat] (20:42 - 20:58)

That's the one, Can't Hurt Me, yeah. I think he's got another one out as well. I haven't read the second one.

But that Can't Hurt Me is amazing. The audible, he speaks it on audible. I'll tell you what, he's got like the most motivational voice I've ever heard.

I would definitely read it again. There's not many books I would read twice or listen to twice in a row.

[Josh Keegan] (21:01 - 22:03)

He's mental. I think he's going to describe David Garvin. So let's do it.

So we're going to dive into mid-month mentoring. We've got three people down here. If you want to raise, if anyone's got a topic that they want to do, if we've got time, pop it in the chat box and we'll aim to do that.

I've got Stephen Cowgill, I've got Ashley Gray, and I've got Grant. Now, I think Stephen and Grant both had a slot last month. So we'll kick off with Ash, and then we will go with Stephen and Grant after.

Greg, I think you said you might have a topic. So just put stuff in. And we'll aim for about 10 minutes per person to work our way through.

Yeah, Gareth's just put a topic in there as well. So what I'm not going to do is stretch this out and spend 20 minutes per person, if it only needs five or six minutes. And I really would welcome anybody chipping in if they want to.

Just raise your hand so we can kind of keep a bit of order. And any kind of guidance or advice you've got would be much appreciated. So let's kick off.

Ashley, do you want to share us with the challenge? I believe you've got some sort of deal that you want to do, but it's not in your strategy.

[Ashley Gray] (22:04 - 23:36)

Yeah. So basically, I've been speaking to an investor, a local pin. He's offered a HMO that's got social housing, which can be renewed for three to five years if I wanted to buy the property.

I've never bought a HMO before. One of my strategies for this year is BIR. My objective is to finish my first financial fortress.

So I have got a plan of how I was going to do that through doing the refinance, doing just standard buy to let. However, the HMO would basically cover 60 percent of my family fortress, or whatever it's called, in just one deal. The only thing is, if I did do the deal, I've locked off basically all of my money that I've got to use.

But then, on the other hand, with the return that it gets and potentially money from my other business, I could then save up and say six, seven months down the line, go again and buy another buy to let or another two buy to lets, and then I should have my first fortress locked in. So I'm just like, what should I do? But my concern is I've never done an HMO before.

So it's like shiny penny syndrome.

[Josh Keegan] (23:37 - 23:39)

Is it already up and running as a HMO?

[Ashley Gray] (23:39 - 24:11)

Yeah, yeah, yeah. So I've been I've been there. Viewed it.

Seven bed HMOs. Rooms, you know, they're using and then one's being used as an office. I think it's social housing.

So it's there. They're willing to, you know, agree on a three year lease. But again, you know, I'm a bit apprehensive.

I'm kind of the person who if I know what I'm doing, I'll just stick at one thing and just keep milking it.

[Brief acknowledgments] (24:12 - 24:13)

Yeah.

[Ashley Gray] (24:13 - 24:16)

So that's that's my concern, really.

[Josh Keegan] (24:17 - 27:15)

So I think, yeah, a few points. What is some people raise their hand and there's a few bits in the chat box. So we'll kind of work our way through, I think.

And firstly, I think it's really good that you've set yourself a strategy. Something's come in that's not that strategy. And rather than just jumping on it, you're actually really considering it, because I think there's very few people in there in this room that would do that.

I think it's like so well done. That's really good because we want to get strategic, want to be clear on what we want and something else. A new opportunity has come up and the fact you're like sitting with this going, is this right for me?

Should I do it or should I not do it is really good. I think like the the objective for you is the financial fortress, which you've been quite clear on. And really, that should be the objective for each and every single one of us.

That's what we should all be looking to achieve like long term. And if you think about what financial fortress is and what it's going to achieve, it's going to achieve financial independence. So for everybody that needs a refresher on the financial fortress, what she's talking about is getting to a place where you have a level of equity with a level of low risk return, which exceeds your lifestyle costs.

So it actually exceeds your lifestyle costs. And that's not noisy HMOs. That's not service combination.

That's relatively boring, relatively risk, low risk, long term secured investments. And HMO with a three year lease on it, I would say would definitely fit in that in that category. So.

Based on that, what I would say to Ashley is. I don't see why you wouldn't go ahead and do this deal. Obviously, a lot of due diligence, a lot of like looking at the numbers, looking at that lease with the charity, looking at past P&Ls.

But it's not like you're actually creating a HMO. You've got an already existing HMO, which has got an already tried and tested lease on it. And yeah, it's not like actually going out buying a property and converting it to a HMO.

And it's the conversion, which is normally the challenge. And it's funny that the lease, which is in the next challenge, it's like ready made and it's good to go. So from my perspective, I think it would get you there faster.

And I don't see why you wouldn't at least pursue it. The only things I'd start to think about is, well, why is you know, why does this investor actually want to sell it? Like, you know, what's the reason for that?

So you want to look into those. Gareth Morgan's raised his hand, and I'm assuming that's because he's probably going to flag up the fact that there could be issues around funding for it. You know, getting a mortgage on that could be a bit more challenging with charitable leases, for example.

So although I'm saying I think it sounds good, I think you need to do your due diligence, make sure it's going to stack really kind of way up. But if it's going to get you there faster and it's going to be like doing three deals in one, then I don't see why you wouldn't progress or pursue it. Plus, you've got the whole group that you can lean into for support and experience.

[Ashley Gray] (27:17 - 27:31)

Yeah, so my biggest concern is that I'm basically going to have no funds once I've put all my money into one deal, if that makes sense. I'd like to have a bit of cash. Are they your own funds?

Yeah, they'll be my own funds, yeah.

[Josh Keegan] (27:31 - 27:36)

Cool, but you said you could get back to a place where the returns in seven months would allow you to buy another deal, didn't you?

[Ashley Gray] (27:37 - 27:42)

Yeah, obviously it wouldn't be to the size of that, it'd just be a deal where it'd be just like a standard buy to let.

[Josh Keegan] (27:42 - 28:08)

Yeah, of course. Will's just put in the chat box, JV, take some private finance, find ways to fund this. If it's the fact you're just worried you won't have your own capital around you because that makes you nervous, do half of your own money, half of an investor money, like just see how you can stack it.

Yeah, okay, yeah. Gareth, did you want to say something?

[Gareth Morgan] (28:09 - 28:20)

Yeah, so great question, Ashley, and I think there's a few things, and we could go quite deep on this, but just try and keep it as high level as possible. Do you have any other buy to lets at the moment?

[Ashley Gray] (28:21 - 28:22)

Yeah, yeah, yeah.

[Gareth Morgan] (28:22 - 28:27)

How many do you have? I have three. Three, okay, and have you had those for more than two years?

[Ashley Gray] (28:30 - 28:35)

Yeah, one will be coming up to, it's just under two, but the others, yeah, I've had the other two on.

[Gareth Morgan] (28:35 - 29:00)

So from a mortgage point of view, and this is general for everyone, in terms of if you're going to purchase a HMO, with the majority of lenders, you need to be an experienced landlord, which usually means need two buy to let properties for the last two years. So you tick that box, which opens up the majority of HMO lenders. Now, the challenge here is the fact that it's, is it a housing association?

[Ashley Gray] (29:02 - 29:08)

It comes under social housing, doesn't it? I believe, because it's mental health, it's a mental health.

[Gareth Morgan] (29:09 - 31:14)

And again, I know Dan and Josh and the guys talk a lot about sort of back to back leasing and trying to lease these properties out on long term deals, which is great. But there's lots of different sectors within that. So obviously, you've got charities, you've got housing associations, you've got the council.

But within that, as a housing association, for instance, you might have something where they've got care. There's a care element, it might be for homeless, it might be for ex-convicts, it might be a mixture, it might be move on accommodation. So there's lots of different sectors within that.

And the lender is going to want to know who the actual end user is, not who the, because the tenant effectively is the housing association. But who the end user, which is a phrase you'll probably hear is who is actually going to be living in the property. So that's just something to bear in mind, because that reduces your lending options.

So there's obviously there's the mortgage questions around that. And then secondly, your point about being concerned about using your funds, I would say. One, you know, a lease to a housing association, for me, is more beneficial than a vanilla buy to let because you are going to get less issues as long as all the details in the lease are done properly.

So it's less, it's more passive and less work, because even with the most vanilla buy to let, you can still have issues with tenants. And secondly, if you're looking to grow a property portfolio, then you're always going to need funds from somewhere. If you're going to know, very rarely have people got enough of a pot of their own money that they're going to be able to build a portfolio quickly enough.

So you're going to need funds from somewhere at some point if you're going to do it that way. So if you're looking at the BRR method, you can lend money from people, do the deal and then pay them back. So with this deal where you're not going to be able to do that quickly, then that would make sense for me to use your funds for that and then find money elsewhere for a different deal.

[Ashley Gray] (31:15 - 31:41)

Okay. Yeah. I've got two questions off the back of that.

Sorry if I'm taking up too much time. This is what we need to talk about on another subject, you know, another time. But I spoke to my mortgage broker and he was saying like nine, 10% for interest on housing associations.

Is he right in saying that?

[Gareth Morgan] (31:42 - 32:20)

So this is where it gets a little bit quirky. So anything up to, on a lease, anything up to three years is under the sort of standard by-to-let law. But when the lease goes to over three years, it becomes the Landlord and Tenant Act, which is then more commercial.

And so then the chances are with most HA stuff or any of these types of deals, it's going to be classed as commercial. So one, you're probably going to get a lower loan to value than what you might think. So that's something to bear in mind.

And two, the rates are going to be higher than your standard sort of by-to-let lenders.

[Ashley Gray] (32:21 - 32:23)

I think we could have a chat about.

[Gareth Morgan] (32:23 - 32:24)

Yeah, absolutely.

[Josh Keegan] (32:24 - 33:02)

I was just going to say, actually, I think that's something to do. Like, I think I think overall, like the original question about doing something that's maybe not in the strategy. I think it is because it's going to get you to the financial fortress target quicker.

But then I think it's just about pulling together all the expertise. Have a chat with Gareth. Start speaking to all the people in the room that know what they're doing with this stuff and then just start putting it together.

Do your DD. And you might find this deal falls through or you might find that you don't get ahead with this one. But I think this is actually going to set you up for potentially a much faster way to achieve that financial fortress goal.

And if you've got three by-to-lets in your belt, it might be time just to make that progression onto a HMO, make that progression onto something a little bit bigger and a bit more challenging. OK. Yeah.

[Ashley Gray] (33:02 - 33:13)

Great. So can I just ask the group then, has anyone had any experience with leases and could potentially have a chat with me about it? I wouldn't know what I'm looking at, really.

[Josh Keegan] (33:13 - 33:22)

I know Chris McDermott's in the room. He would want to speak to. I think you speak to Gareth as well.

Anyone else got any experience?

[Carol] (33:23 - 33:32)

Yeah, I have. But it's Irish leases, guys. 25 years.

I don't know if they're the same as the UK. But please feel free to give me a call, whatever.

[Ashley Gray] (33:33 - 33:35)

Nice. Thank you. Thank you.

[Bianca / Admin voice] (33:35 - 33:39)

Me too. You can contact me and I can put you in touch with my broker.

[Ashley Gray] (33:40 - 33:42)

Nice. Perfect. Thank you.

[Josh Keegan] (33:44 - 33:46)

All good, Ashley. It's given you enough to think about and enough to move on with.

[Ashley Gray] (33:47 - 33:48)

Yeah, yeah, definitely.

[Josh Keegan] (33:48 - 33:55)

Thank you very much. Nice. Who wants to go next?

Mr Cowgill. I think your topic will apply to everybody.

[Stephen Cowgill] (33:56 - 34:08)

Yeah, I think I think you're right, Josh. But I think because I was I was in last week, I think Greg's going to take this slot now. Maybe we'll pick up that headline one later, if that's OK.

Yeah, I don't mind. Greg, are you taking this slot?

[Greg] (34:08 - 35:15)

Yeah, yeah, sure. Thank you so much. So I wanted just to go go back and get some help around the planning for the headline strategy.

So I've already spoken to my team and I haven't sent the the briefs out to the team just yet, as I just find out how difficult it is to find a time before Christmas, especially now with everything going on. And yeah, it's just just life. So we will find it, whether this is even a weekend, but just going on the objectives.

So I've seen some presentations being sent in the group and Rupert helped share his as well. And just on the objectives, we've got personal and we've got professional. And also we've got the distribution of focus, 70, 20 and 10.

Should we have also objectives for the 70, 20 and 10 or just that should complement the general objectives of the professional slash personal? How? What would be your advice?

[Josh Keegan] (35:16 - 35:26)

Yeah. So just just to clarify. And you start off talking about headline strategy and we've moved off that onto personal and professional objectives.

We're not we're not intertwining those, are we?

[Greg] (35:27 - 35:44)

Well, no, no, no. So my headline strategy is it's basically family time because I just yeah. Over the last two years and the amount of education and I've not taken enough time for my family.

So that needs to change.

[Josh Keegan] (35:44 - 37:12)

Does anyone want to give Greg a bit of insight into what he's potentially missed with his headline strategy? Should be year of. Yeah, cool.

So so, yeah, that's the point I was getting at Greg. And I think it's like this happens every year and you might just use the wrong terminology, but I want to make a point of it. So everyone's super clear.

So year of is like the chapter of your book in life. It's like, what is the next chapter of my life and look like? And generally it will span personal and professional, be a bit both.

For example, it could be year of balance. And that means you're probably going to spend less time working the business, more time going on holidays with your family and it kind of spans both. That's different from your headline strategy.

The headline strategy is just for the business. And that's a strategy. And it's basically the destination in the sat-nav for your business.

And a really good thing to think about here, because it's really like it's a really important point. And people get this wrong all the time is your year off can be very personal to you. So my year might be year of balance.

And it's I want to work less. You know, I want to spend more time with my family. I want to get away from speaking to the team quite as much.

But that wouldn't then be my headline, because if I go to my year of balance, it's like, well, I want to have balance, which means you're going to have to work harder. That doesn't really work. It's not like all for one, one for all.

So the headline needs to be something that you're saying, but also your team are bought into as well, like five star service and work smart, not hard.

[Greg] (37:12 - 37:22)

I think I've got that because I've got year off family adventures and my headline strategy for the for the for the businesses, people and processes.

[Josh Keegan] (37:23 - 40:11)

Perfect. Cool. So that's just really good clarity.

And I think you said before your headline was family adventures. And I think you meant year off. But I wanted to make the point on that.

Just everyone's clicks every year. People do get these things to these confused. So then.

Yes. So that's really important. Get your headline sorted.

Get your year off sorted. Now, in terms of that really question you asked about, how does like distribution of focus fit with your objectives? So I think everybody needs a distribution of focus.

So, for example, me, 70 percent is ultimately 20 percent is proper entrepreneur. It's this and then 10 percent is my portfolio and the leases. And basically, I think it's going on with my kind of investments and wealth, which are relatively on autopilot.

Now, there's always a few things, but relatively straightforward and simple. Now, I'm not going to really like that would just be my focus. I'm going to have a clock if I set up and I'm just going to monitor against them to make sure it's about on balance.

Because at the moment, I think it's a bit out of whack and I need to push to make sure that it is 70, 20, 10. I don't feel like it's quite that at the moment. It's probably like 80, 40, 60 or something silly.

It all needs to kind of come down. I'm not going to put them into my personal, professional objectives, because generally I'm quite good at managing my time. I'm going to use Clockify.

I've used it for years and I'm going to monitor against that. And I've got no kind of major, major like focus on that. However, if for years and years, your biggest challenge is you're spinning multiple plates.

You've always got like six businesses on the go. You're always way too busy. You achieve very little in each or you have a success over here and then something else falls apart.

You might decide that one of your key professional objectives this year is distribution of focus. Stick to my time because you decide that actually that's going to be really important for you this year. And I think based on some of the conversations we've had, Greg, you've been quite busy in certain things.

That might be something you want to incorporate in. So you have it as like this is what my target is. But then you need it as an objective because the objective is something you're going to look at every single week and every single month.

You're going to write distribution of focus and then your target is going to be track my time. And then basically you've got that as an objective then. So that might be something you see as important for you.

And if your year of is family adventures, that might. And to be fair, if your business headline is people and processes, like why do we have more people and why we have more processes? Because theoretically, you should be able to work less.

So I think for you, that could be really it could be really useful to not only have it as a this is what I'm aiming towards, but actually to bring that into objectives as well. OK. I'll answer your question.

Yes, you did. Good. Thank you.

Anymore? Is that we're good? No, that's all good.

Cool. And do you want to Steven or Grant?

[Stephen Cowgill] (40:13 - 40:43)

Who wants to go? Can I just follow up on that quickly? It might take a couple of minutes, Josh.

I think Dan's on the call, but Dan mentioned session last week, give me real clarity on on the year of. And what you started talking about there is helping with the headline strategy as well. But what I'm still not clear on is obviously the year of you've got the year of and you've got a three personal, three professional.

What sits below the headline strategy? Is that similar? Is that three and three or is it?

[Josh Keegan] (40:43 - 41:59)

What's the what's the headline strategy is going to be three objectives for the business. Right. So if you think so, for example, it might be that your your objective is five star service.

So you say we want to get one hundred five star Google reviews this month. We want to get ten out of ten of our feedback scores and we want to put a new we want to recruit a new customer service manager. And those might be your three objectives.

And what is what you're thinking for your headline? What is yours at the moment? I think it's along the lines of proof of concept.

Cool. So proof of concepts like think about what the objectives might be that go alongside of you achieving a proof of concept. So what we want to do is by the end of the year, like a good headline strategy should tell me what you're trying to achieve.

So I'm assuming by the end of the year, you want to have tried and tested a strategy that works well for you. Property strategy or whatever it looks like. You can then roll out next year.

So it's like what the objectives for that. What it could be. You tell me.

What could the objectives be? I'm just trying to think something like it could be like inspiration.

[Stephen Cowgill] (41:59 - 42:18)

So I think the things in my proof of concept is up there. But some of that is like systems put in the system in place below that, put in the relationships in place. And I think the main thing for me is taking advantage of the niche of being an expat with UK contacts in property.

So there are things that are mulling around in my head at the moment.

[Josh Keegan] (42:19 - 43:22)

Perfect. And it's just things like that. That's exactly it.

It's like you're all about getting set up. You want a social media presence. You want to understand what you're offering to who.

You want to you want to try a few deals out, see how it goes. So it's like it's like bottling that into three objectives which are going to support you in achieving that proof of concept by the end of the year. And then in next workshop, we're going to do targets as well.

So each one of those will then need a target. And that's like the next level to this as well to make like a tangible target. So is everyone clear on that?

So headline is going to be headline for the business. What is the destination you're sat now? Where are you trying to get to?

And it needs to be really clear. Like for me, proof of concept is a really good one. So it's like by the end of the year, I need to have a proof of concept.

I need to prove the concept like this is how the business is going to work moving forward. And the following year, Steve, yours will probably be something more blazy like grow or cross the desert or whatever you like. And then underneath that, three supporting objectives, which are basically the things you're going to do within the business to actually achieve that headline.

Perfect. Thanks, Josh. Go on, Carol, you've got your hand up.

[Bianca / Admin voice] (43:23 - 43:47)

Thank you. Can I just ask a question, though? If I've got three businesses and I've got aspirations to progress them all because they relate to my financial fortress.

How do I choose one headline strategy? Is it that I choose, well, the one that I'm spending 70 percent of my time on?

[Josh Keegan] (43:51 - 44:46)

So generally headline strategy, you'd have a headline for each business. Right. OK.

I mean, having said that, though, I mean, I'm probably only going to have I'm probably actually only going to headline for Ultimate FT, which is the one I'm spending 70 percent of my time on because it's like it's got a team. You know, there's an active push with my portfolio. I'm probably not going to bother with that.

It's like it's basically all I'm like, it's running on rails, really. You know, there might be a few bits. And with Props Entrepreneur, it's just part of that company.

So I'd say you might make your main focus, your main headline. I would say, like, if you've got a team in the business. You need a headline.

If you've not got a team in the business and it's like just sitting there not doing much, you may or may not need it. But I'd say generally headline for each of the companies. And then.

But the main focus needs to be that 70 percent one.

[Bianca / Admin voice] (44:48 - 44:48)

Right.

[Josh Keegan] (44:49 - 45:21)

Just make sure you're not spreading yourself too thin as well, Carol, because it sounds like you've got a lot going on. And it's really important that we start kind of saying don't fly multiple kites around your garden, launch one rocket into space. And I've definitely seen as I've actually started focusing on one company as opposed to when I used to do three or four.

It's like it's been like chalk and cheese, the results. Steve. Sorry.

Yes, I'm trying not to hold the headline. I'm loving this hand raising as well. I've never seen such an organized group.

It's brilliant. Normally it's like a fight to speak.

[Stephen Cowgill] (45:22 - 45:32)

So the question I've got is the distinction between the professional objectives under the year of and the headline strategy objectives. Amazing. Cool.

[Josh Keegan] (45:33 - 47:06)

So think about once again, like your headline strategy and the supporting objectives are all objectives you would share to your team. Now, I appreciate you may not have a big team at the moment, Steve. So I get that.

But, for example, for me, it would be stuff I'm going to share my team. So and the personal, the professional objectives underneath your year off would be more like professional growth. So it's like professional growth.

So, for example, I'm playing around with journals downstairs. And, for example, one of my objectives for my and my professional is just have like basic build my war chest. So it's basically around me.

I want the war chest of capital around me. So around very lean for a long time. So I've always been growing and developing this year.

I'm make sure I've got everything around me for like that, you know, that emergency rainy day and that security. Now, I wouldn't share that with my team because it's irrelevant. But in ultimate FD, I might then have achieve a 200K, 300K, you know, whatever is certain level of profit for the year.

Now, I know. So I can share that with the team. You know, guys, this is the profit target.

This is the revenue target we're going to hit. But I know that I'm going to take that money. I'm going to put it into a war chest.

But the war chest is not relevant to the rest of the team. So say like personal, professional objectives are all about your professional development. Manage my time well, you know, build, feed the financial fortress, do nothing, delegate everything.

It's like it's like what you're going to develop as a professional. And then within the business, it's like actual specific things that you and your team are going to do, going to do together, essentially.

[Stephen Cowgill] (47:09 - 47:09)

Perfect.

[Josh Keegan] (47:10 - 47:18)

Yes. I'm loving all your contributions to the group, Stephen, by the way. I think you seem to be in your flow.

Yeah, I'm going to shut up now though.

[Stephen Cowgill] (47:18 - 47:20)

Having said that, let other people have a go.

[Chris] (47:20 - 47:25)

Good. Josh, can I ask you a question? I don't know how to raise my hand, so I'm just going to jump in.

[Josh Keegan] (47:25 - 47:26)

Chris, you've ruined it.

[Chris] (47:26 - 47:27)

I can do that.

[Josh Keegan] (47:28 - 47:31)

I don't even know how to raise my hand either, so we're in the same boat.

[Chris] (47:32 - 47:41)

Just on targets. And I appreciate we're going to cover them next time. But do your personal and professional objectives need targets or is that just the headline strategy?

[Josh Keegan] (47:41 - 49:09)

No, everything needs a target. So some of the feedback I've been given in the group is things are a bit too like wishy-washy, a bit too like woo-woo. And it's like and really that's because everything needs a target.

So, for example, if you're going to I'm going to be my best spiritual self. It's like that's cool. But what does that mean?

And that could be I meditate for 30 minutes a day every day for 365 days or whatever that's going to be. And one of the things we're going to choose on advance this year. I don't know if we can do on the program this year because this year we just want you to nail your presentations.

I think we will do is basically every single every single objective should have a picture of what this is, what success looks like. So Dan did his incredible bulk. It is a picture of the Hulk.

It was like, that's what I'm going to I'm going to try and achieve. It's like all of these things need a specific. This is what that looks like.

And if you can't give it a tangible target, then generally it's probably not an objective yet. And this is just about actually be able to tick off the end of the year. What we don't want to do people do this sometimes is you get to the end of the year and it's like I said I was going to get in the best shape of my life.

I kind of done it. Yeah, I've done a lot more gym sessions than I've ever done. And I've done this.

Yeah, I might put on a couple of kilograms, but I feel really good. So I'm going to give myself a tick. It's like, no, it's not tick.

Like what's your BMI? What was that going to be? What's your metabolic age?

And it's finding these things that are actually you're shooting for. And at the end of the year. Yep.

Yep. Yep. Yep.

Yep. Yep. That's where we want to get to more on that in a workshop.

[Grant] (49:12 - 49:20)

Grant, do you want to go? I don't mind if someone wants to take my spot that has a burning thing they want to do, but I've got something.

[Josh Keegan] (49:20 - 49:31)

Yeah, you go. And then I'm going to put on there about CRM and task managers and we'll do that to to finish. So, yeah, we've got about 20 minutes.

So go for it.

[Grant] (49:32 - 51:32)

So mine is around essentially the best way to launch a new product or service. Give you a little bit of context around that. We obviously we've got to a place now where we're sort of dominating.

I would say Swansea and surrounding areas when it comes to short term rental management. We know it like the back of our hands. We, you know, we've we've got to know the area.

We sort of mastered the area itself. And, you know, our we wanted to test a product that in 2025, we could exponentially grow, if that makes sense. So 2024 is all about, you know, optimising and maximising profit.

But we do want to test a new product that we can exponentially grow with. And that product is a remote management service where people can take advantage of all the systems that we built in the background that only a company of our size can build and pay for and give people access to that at a lower fee. But we don't take control of the on the ground, you know, operation.

So one of the challenges of scaling a short term rental management business, which is where a lot of people have failed. I've seen people do it a lot of times where they've tried to scale it. They haven't been able to handle the on the ground operation.

But basically, a lot of people struggle with the back end systems, you know, driving revenue, driving bookings, customer service, dealing with all the noise that comes in from customers, which we would take care of because we can do that all remotely. But basically, it's a remote management service, a brand new service that we've never offered before. It's more the concept around testing that as a product and how we go about launching it.

[Josh Keegan] (51:33 - 51:36)

So what's the question? How do you build that into your strategy?

[Grant] (51:37 - 52:00)

The question is more about what's the best process to go through? I think you guys touched on it in the blueprint three day where you sort of start introducing it to people and then, I guess, bring it in and start offering it as a product. Almost like, you know, we're going to offer it for 20 clients.

We've now only got 10 spaces left or whatever that might be.

[Josh Keegan] (52:01 - 52:19)

So I think. So it's probably like quite a few different sentiments here. And the first two are going to contradict each other.

So Adam's bit of advice was. So to me, by the sounds of what you're going to build is basically a bit of software. It's almost like a short stay management software.

[Grant] (52:20 - 52:28)

So we've already got it there, but it's all of our staff will be involved, but it will just be our remote staff that be involved in it, essentially.

[Josh Keegan] (52:28 - 52:34)

So your remote staff, it's a service then. So it's basically property. It's basically short stay management.

[Grant] (52:35 - 52:39)

Yeah, essentially management, but without the on the ground support.

[Josh Keegan] (52:39 - 53:12)

Cool. So I think that just. Yeah.

So a number of considerations there then. So make sure this doesn't get in the way of what you guys are doing this year, because this has potential to be very great. But also potentially like extremely noisy and it's probably going to contradict your guys plan, which is all about optimizing the P&L this year.

So that's just one of the key sentiments there. So obviously, if you're going to do it, it's cool. You can have it on your underneath your headline as an objective.

But it would just be like proof of concept for.

[Grant] (53:13 - 53:23)

Yeah. And that's sort of why we wanted to limit it to a certain amount of new clients and not go above that. So if it goes bonkers, we're literally going to cut it off at a certain point.

[Josh Keegan] (53:23 - 54:03)

So that I would like if I was you, I'd probably go like you probably you probably only know five or six people that would want to use it. They probably already approached you. I would say like approach them, say, you know what, we're going to give this a go.

This is what we're planning on launching. Would you be interested in signing up as one of our pilot users? Say like, you know, this stuff first few times doing this, it probably won't be the best it's ever going to be.

And I would just get get those people on board and just just try that for a year. That's how I would go about launching it on the flip side of that. I would probably tell you not to do it because I think you guys are in an amazing place.

And do you need more cash flow? Is that what you're after?

[Grant] (54:05 - 54:15)

Um, well, what we want to do over the next five years is build the business to be able to sell it for or have the option to be able to sell it in the next five years.

[Josh Keegan] (54:16 - 54:18)

So for what? Like a chunk of cash?

[Grant] (54:18 - 54:25)

Basically, on our 10th anniversary, we either want to be in a position to sell it or have the option to sell it if we want to.

[Josh Keegan] (54:25 - 54:32)

You sold the business now. How much do you need to add to it to kind of get the value you want?

[Grant] (54:33 - 54:37)

10 exit in the next five years.

[Josh Keegan] (54:40 - 55:26)

Um, I think it's just been really clear on this, because I think this is one of those things that will probably eat you alive. And it's like, it sounds all very simple. I mean, like, yeah, by all means, test out this year, see how it goes.

Offer it out to five, six people that you know want it already. Friends, family members just do almost as a bit of a favor. Take a bit of money and see how it goes.

I think you guys are in a really good situation. And I would be I would be a bit reluctant if I was you to keep adding more. Essentially, this is like a cash flow business to your business because you're going to create more noise, more problems.

Whereas I think you guys should probably move up to that profit play. So I kind of start thinking about like, do we actually want this cash flow or do we want a profit, some sort of profit play that sits above it? Because it's just much easier way to make probably a lot more money.

[Rob] (55:28 - 56:31)

Josh, I have a suggestion just based on like, I suppose it depends on the outcome you're looking for. But on the assumption you're just trying to validate the viability of your new proposition idea. A good framework I use that could be relevant for you would be to actually just to figure out a way to test the demand.

So how I do that is I'd actually mock up a website and just that outlines the service you're offering, the value it brings, et cetera, et cetera. So just a basic kind of landing page, which also has a form capture. So the ability to for interest in one step ahead of you.

Yeah, because I can obviously do some digital advertising with that. Like and if you have that and like if you see them signups, you know, you're probably on to something.

[Grant] (56:32 - 56:49)

Yeah, we've already we're currently launching a landing page with some paid ads just to see what leads we get from it. So, again, if that goes bonkers, then we sort of know what the demand will be from it. So, yeah, great suggestion.

[Josh Keegan] (56:49 - 57:12)

I mean, from my perspective, I don't think you need to worry about the demand. I think I think as soon as the word gets out there, you'll be struggling to back people away as opposed to like struggling to get people on board. And I think probably for the first couple of years, there will be people, you know, people on this call, people you've got in your book.

I think I think my biggest sentiment on this is, yeah, try it out. But just be really clear why you're doing it, because my concern.

[Grant] (57:12 - 57:57)

And I appreciate that, Josh. I think that's one thing that I struggle with that Kay really helps me with is the fact that I'm I'm all guns blazing when I've got an idea. I just want to go hell for leather and see how much we can make from it.

But the sentiment that we figured out over the last, you know, at least the last 12 months is that that when you grow to a certain size that can have its own dangers. And we struggled with cash flow at the beginning of the year. And we really had to go into granular detail with our financial forecasts.

And now we've got it under control. But that just goes to show if you don't have a handle on the back end, how much of a danger it can be.

[Josh Keegan] (57:57 - 1:00:15)

Yeah, I just I think, yeah, at one point, I would just suggest. And so the other bit of advice I'd have you as well is you could like if this is all about optimizing what you're doing and the bottom line, you could just create like really bolster up what it is you're doing yourselves this year, which you're going to do anyway. And then potentially with an idea for like bringing out to market next year and with an idea of like potentially doing that for people next year.

I just think it's probably might be a bit of a distraction this year. And it's probably going to. It's probably going to stand in the way of what you want to do, because like managing them for yourself versus managing for other people, there's loads of nuances and complications, which you can't even think of right now, but are going to make things complicated.

And so I would if I was you, I probably maybe do three or four people. If I was being really honest, I'd probably say don't do it. Just just focus on bottom line for your business this year, which you're probably going to hate because you're dynamo like blaze.

You want to do the next big thing. But really, you need to steal energy right now and just lock in a focus on the margins. And the more you can increase that profitability, the higher that valuation is going to get anyway.

And then if you still got that burning design next year, you know, potentially do it. I would sell it as a separate limited entity. I'd kind of de-risk it, keep it away from the existing portfolio.

I would let your portfolio be managed by it. So you become like a third party client to it and make it real business and really stack the overheads properly. Because when you start adding other people's stock in, it just is a very different ballgame to having having your own.

Obviously, that's a HMO management agency, ex owner talking there. But I think it's quite similar from what I've seen. I've seen behind the scenes on a few companies that have tried to do this.

And it's generally well, I've never seen anything that's not quite messy. So I think it's just being aware, aware of all those things before you dive into it. And just get into the journal and really think about like why you really want to do this.

And I think to get to your 10x valuation or whatever you want to achieve. I think this is quite a hard way to do it, personally. I think there are probably easier ways with your guy's skill set that you could get there.

OK, yeah, no, good point. Just some things to think about. OK, thank you, mate.

No worries. Right, we've got a final last couple. By the way, we're probably running over on time a little bit.

So if anyone needs scouts, just feel free to excuse yourself. It's cool. Gareth, so you want to talk about CRM and task managers.

[Gareth Morgan] (1:00:16 - 1:01:37)

Yeah, thanks, Josh. Yes, it's quite a complex, lots of different systems out there. So we've got a CRM that we use for a mortgage business, but it doesn't cover all the products that we use.

So it's not ideal for that. And we'd like something that we can add things into. So I know you guys, but also we want.

So that's just a task manager for mortgage sales, effectively. But what I'd like, obviously, as well in the background is I want a CRM for our sort of email marketing and automations and things like that, which we haven't got at the moment, which I'm one of the big things I want to set up. So I know you guys use Asana, for instance.

A lot of people use Asana as their sort of back office business management and task management and things like that. And you can add layers onto it. You can assign tasks.

But I'm trying to find that. And I don't even know if that's out there, something, the single point. So something's a task manager and does the sort of email automation, CRM and that type of stuff as well.

So I don't know if anyone is using one of those that can recommend or just looking for some feedback on people's experiences on good or bad systems, really.

[Josh Keegan] (1:01:37 - 1:01:44)

Has anyone got one that kind of is a one size fits all that does CRM, task management and everything like together?

[Gareth Morgan] (1:01:47 - 1:02:14)

Cool. That answers that then. So, yes, I think that's so, you know, it's right.

OK, well, in that case, now it's a focus on right, which is the best one, you know, for email and marketing and automation and that type of side of the business. And then you hear that you've got to have two separate. That's fine.

But, you know, rather than whilst I'm in the position now where I'm going to be doing this, it's knowing that there isn't an all singing, dancing one. And I think.

[Josh Keegan] (1:02:16 - 1:03:47)

What I'd say from my experience, trying to trying to do this stuff is like sometimes it's better just to have multiple systems that are good at doing one thing than trying to find one system that's that's kind of averagely good at everything. So if I were you, I'd probably look at like if you've got a great system for kind of your CRM at the moment and kind of tasks around progressing sales, mortgages, etc. That sounds really, really good.

Is there a way you can add daily tasks or any kind of repetitive tasks on there or ad hoc tasks on there? I'm not sure, but I would explore doing that. I don't know if I'd want to add in things like Asana as well.

I think that's probably complicated if you've already got if your team has to update two systems, you could just basically use Google Sheets, which can give you a checklist of things that people need to do. You could like bring that in. I'm sure you could create a daily task list on there on the CRM you've already got, which links to Google Sheet, which just got a list of all the things they need to do each day.

I think I'd probably just try and keep things simple. The more systems you add in, the more complicated it gets for people and the harder it gets to manage people. Even having emails and Asana is not good.

It throws people. So we're going to do a session on Asana in a few moments. But I'd say if you've got a good CRM system, which does have the ability to manage tasks, I would see if you can work that into something and make that work for you.

That's what I would do.

[Rob] (1:03:49 - 1:03:55)

Sorry, can I just ask Garret there because I might be able to help. Garret, you mentioned before you use Notion, right?

[Gareth Morgan] (1:03:56 - 1:04:04)

No, I don't. No, that was a question and somebody mentioned they use Notion and I was interested to have a look at it. I think it was Liam who did kindly offer to.

[Rob] (1:04:04 - 1:04:46)

I use Notion as well, which I highly recommend as the kind of internal kind of place where artifacts are stored, where workflows are created and managed, task lists and all that kind of stuff. And Notion also has a highly integrable platform. So you could quite easily, through a technology called Zapier, integrate Notion into an email CRM.

So that's the route I'm kind of going down and I'm happy to kind of show you how that all works if you want.

[Gareth Morgan] (1:04:46 - 1:04:47)

Yeah, that'd be awesome.

[Rob] (1:04:47 - 1:04:48)

Thank you.

[Josh Keegan] (1:04:48 - 1:07:27)

Just one of the key sentiments I'll offer there though is because we did this where we created Zapier for everything. And one of the biggest kind of things that could hold you back as well, Rob, and this is for everybody, is when you create things like Zapier, which you understand. But the lady you've just recruited who's, you know, part-time mum, 55 years old, doesn't understand.

As soon as it breaks, you're the one back in having to fix it. And so that's what I found the issue with. I'm quite systems orientated, so I was creating all these systems, all these automations, this email automated that, etc.

But as soon as it breaks, I was back in trying to fix it. And it's not how I wanted to spend my time. So I think it's a really good point, Rob.

I'd just say, just really make sure that we're keeping this super simple, because then other people can run with this. And it's like almost sometimes simpler, which takes more time, can be better, the more complicated it saves in time. But it just breaks and they don't know how to use it.

And it's like a huge kind of training piece at the start. So I'd keep it really simple the best we can. If your automation is great and if you've got something in the office that can run them for you, brilliant.

But try not to make it crazy. And I mean, it's the reason why you have to stay in the business. Awesome.

Thank you. I appreciate it. Yeah.

Thank you for your input on that, Rob, as well. I've just Googled Notion. It does it really good.

It's really, really good. Cool. A few more bits to finish then.

So Andy, can you remind us of the Strategy Day session and WhatsApp group with the team? Yeah. So Andy just asked, can you remind us of what the Strategy Day session and the WhatsApp group is with the team?

So Strategy Day is all about actually sitting down at the start of the year saying this is the business plan. This is the plan for the year. This is what we're going to do.

And this is how it's all going to run. Then the WhatsApp group is basically for your winter hit list. So that's basically any issues that are going on in the business.

They post into it, you post into it. So you've got a log of all the things you need to fix in the new year. Rob's put a bit in there as well.

I think we're all good. Got two minutes left if anyone wants to use the final couple of minutes of time. Otherwise, I will see you all.

Make sure you're online for the next week. Any final bits to finish? Oh, just while I've got you all as well, I remember Christmas jumpers at the next workshop.

Get it nice and Christmassy. Andy, I imagine yours is going to have lights on it for some reason. I just know.

I imagine you've got like a wardrobe full of them. Right. All right, ladies and gents.

Thank you all so much. Speak to you soon. Best of luck.

Get in the cave. Smash it out of the park. I'll see you all at the next workshop.

Thank you. Bye.

[Andy] (1:07:30 - 1:07:38)

Thank you. See you later, alligators. See you.

Josh, how do we how do we get to speak to you about the ultimate FD?

[Josh Keegan] (1:07:40 - 1:07:58)

Just reach out if you want to reach out on Facebook. I'll be happy to help you. I'm going to be in some sessions over the next few months as well.

So give you more information. Yeah. If you want to reach out, if you want to get your call books in.

If you just send me a quick message on Facebook, my VA will pick it up and she'll send you a link and you can get your call books in. OK, thank you. Thank you.

No worries. Thank you.