

PART I

FRANCISCO

SIRVENT

I Went to Law School and Got Absolutely Nothing for It

It had been ten years since Francisco graduated from law school and three years since he started the Keystone Estate Planning law firm. The alarm clock on the nightstand next to him seemed to be mocking Francisco as the digits 1:05 illuminated the room. Nicole slept fitfully next to him.

Nicole sat up in bed, catching Francisco's attention. "Are you okay?" he asked.

"Just...just having trouble sleeping. Can I get you anything?" Nicole asked, trying to act as if it wasn't Francisco's tossing and turning that had interrupted her own sleep. Nichole knew it was harder on Francisco than on her because he blamed himself for their family's predicament.

"No thanks. How are you?"

"Just thinking."

"Hey," Nicole laid next to Francisco, "It's gonna be okay. There has to be a way."

"There has to be," Francisco re-asserted.

Nicole kissed Francisco. "I'm gonna lay back down. Please try to go to sleep. Losing sleep on worrying will only make it worse."

"I'll try. Good night."

Francisco recalled his time at the office 2 hours earlier. The night was late, and Sondra, the only staff on his team, already departed home earlier. Seated in front of the computer, he checked this month's sales, hoping for a brighter forecast. This month accounted for only one case, with four cold prospects. New prospects were a struggle to find.

Since launching his firm, Francisco managed to grow his revenue to \$250,000 annually. Although, he never took home more than \$60,000 a year.

This was supposed to be the month to make ends meet. And now, with this month's sales, his annual take-home forecast was guaranteed to plummet from \$60,000 to \$50,000.

Francisco wondered what his former partners would think of his predicament. He wondered if he was better off in his past position with them, being surrounded by poor systems, lazy staff and toxic frustration. He wondered if that would've been better for his family's sake.

He punched against the desk's surface like a hammer, gritting his teeth. *'No matter what I do, it's not making the numbers go up,'* Francisco thought. He tried everything possible to make the income rise again. Posters, networking events, discounts and more that led to no success. "FUCK!" he shouted at the top of his lungs.

His eyes wandered to his diplomas framed on the wall. A Bachelor's degree in agricultural and biosystems engineering, another bachelor's in business, and a juris doctorate.

Unfortunately, the knowledge Francisco accumulated did not provide him with the essentials of how to keep his law firm afloat.

From the corner of his eye, the frame photo set atop his desk caught Francisco's attention. It was a portrait of Francisco, Nicole and their four children posed in front of the sunny outdoors glossed with dark green oak trees. This photo, taken a year after Francisco launched his law firm, was the last memory his family had made together.

And now, all Francisco wanted was to see them, instead of being cooped up in the office with panic and worry.

Now, set in his bed, he rubbed the sides of his forehead. Francisco could cast his current feelings as frustration, or confusion. But in his heart of hearts, Francisco knew the truth; he was afraid.

Francisco stayed awake in the night, reflecting, as his brain visualized the numbers from his computer repeatedly—His main hope that maybe there was one outlier that miscalculated the sum amount. That maybe there was another month to fix things.

His throat turned dry like sandpaper. *'I need a glass of water.'*

Francisco got out of bed and walked to the kitchen, getting himself a glass of water. With his mind was wide awake, going back to bed was pointless. Francisco needed to confirm those numbers once again.

He grabbed his laptop in the living room, sat down at the dining table and began re-assessing the numbers. Everything added perfectly. He checked his bank's balances, comparing them to his expenses, including the mortgage.

Francisco crunched together the numbers three times. Each time, his heart sank as it confirmed one thing: Francisco had three months to fix the current state of his law firm, before he faced bankruptcy. Before his family would lose the house sheltering over their heads.

His immediate instinct was to research. Find the solution now, and not waste any more time on this, as the red digits of his alarm clock ticked upward in the back of his mind.

Logging onto WealthCounsel, a listserv for trial attorneys, Francisco figured that there might be resources to dig him out. Maybe these possible resources could be a temporary solution, or even permanent.

He dug past a plethora of absent-minded posts, comprised of all hypotheticals and nothing concrete. Hours passed. Francisco's eyes grew heavier from the computer's harsh light.

Finally, Francisco landed on a post composed by Phil Bluestein. There was nothing more significant of his presence other than seeing his name in several other posts.

In the post, Phil had given praise to an organization called *How To Manage A Small Law Firm (HTM)*. He said the company helped his firm increase its revenue using ground-breaking strategies and so much more. Phil credited HTM with helping him lead a happier team and a happier life.

A happier life.

'Hmm,' Francisco thought, rubbing his heavy-lidded eyes. He opened another tab and googled the name of the company. They held accolades in the Inc. 5000, along with the claim of guiding over 500 law firm owners on how to run their law firm like a business, backed by several testimonials. Francisco double-checked the people behind the testimonials as true attorneys with their own law firms.

How To Manage was offering an introductory ‘bootcamp’ session at this time for a price that would leave a decent dent in Francisco’s bank account. The session detailed on essentials for how to run his law firm effectively.

Francisco could choose to continue guessing on his own or invest in this company that apparently helped Phil get his business climbing. *‘What else have I got to lose?’*

He imagined where his family could be now with the right steps to keep income stable. Traveling freely around the world. Camping, hiking, fishing, road trips and making so much more memories with his family. That was the dream to make a reality.

Francisco found himself awoken by sunlight peeking through the window near the dining table. Without realizing until now, he passed out.

Lesson 1

Note to Self: Include Your Spouse On Every Life-Changing Decision

Ultimately, Francisco decided he was ready to take the leap and join *How To Manage*. Of course, the investment was hefty. For Francisco, with his current level of knowledge, the opportunity seemed more than good.

Before he could commit, there was one person he had to talk about it with.

Francisco walked back to his bedroom to find Nicole awake, stretching her body. “Good morning,” Nicole said.

“Good morning. Listen, I wanna talk with you about something.”

“Sure, what is it?”

Francisco composed his thoughts. The last thing he wanted to prompt out of Nicole was the same kind of panic he endured last night. He spoke with caution, “I’d been looking into things to do for the law firm, and I think I ran out of ideas on my end.”

“There has to be a way, Francisco. You’re not giving up?”

“No, not at all. I did some research last night, and someone recommended this company that essentially coaches law firm owners on how to run their law firm.”

“What’s the name?”

“How To Manage A Small Law Firm.”

“That’s very on the nose.”

“I looked into them a little more, and they’ve helped 500 other law firm owners, apparently. There’s testimonials. I double-checked to make sure the people on the videos were actually lawyers.”

Nicole looked down for a few moments, shifting back up at Francisco. “Okay, well of course they’re offering something for a price?”

“They have this essentials workshop for…well, it’s quite the investment.”

“Uh…” Nicole stammered, “Okay, do we have the funds to cover that investment?”

“I checked. Just barely.” Francisco shrugged. He continued convincing himself this was the right path to try out. “I think it could be worth it.”

“I’m just skeptical. I know you did your due diligence and all, but you’ve been doing this firm work for so long. Are you sure there’s nothing else you can try?”

“I’ve tried everything. If not, then I’ll collect a refund.”

“You sure they’ll give you a refund, right?”

“I just need us to give this a chance, Nicole. I can’t allow us to lose what we have.” He pursed his lips back, refraining from bringing up the mortgage.

Nicole sighed. “I…Okay. Okay, it’s your call.”

Francisco approached Nicole, hugging her and kissing her on top of the head. “Thanks again. I love you.”

“Love you too.”

After the conversation, Francisco signed up for the 4-day bootcamp session. Throughout the course of the session, workshop speakers shared the basic foundations towards building a law firm.

Nicole did not attend any day of the bootcamp session due to prioritizing on taking care of the children. But Francisco made sure to share everything he learned and all the potential ideas to apply into his law firm.

On the last day of the session Francisco’s ears wandered into the surrounding conversations. Small talk mainly, but some of the occasional lines would drop as the following.

“Are you going to the next LQM?” one of the workshop attendees said

“I cannot wait to share with everyone at next month’s Live Quarterly Meeting,” another attendee replied.

Francisco wondered what in the hell this “LQM” was? The more he heard about the LQM, the more he started catching wind of it in conversations.

One coach approached Francisco. Francisco couldn’t recall the person’s name, but recalled this coach wearing a vivid orange shirt, with a head of black hair contrasting against his grey beard.

“Hey, Francisco right?” the coach asked Francisco.

“Hi there,” Francisco shook hands with the coach. “I’m sorry, I didn’t catch your name?”

“My name is Henry. I’m one of the coaches of *How To Manage*. How’d you enjoy the whole bootcamp experience?”

“It’s been great. I’m loving the excitement of getting my firm to grow from all of this.”

“And this is just the tip of the iceberg. Have you considered joining to continue learning with us?”

“I just need to talk about it with my wife first. Y’kno as much as I may want it, this is absolutely a team-based decision.”

Henry nodded. “It is important to bring your significant other into this conversation. It’s a huge investment, and I completely agree both of you guys should be on the same page.”

“I’m glad to hear that,” Francisco replied with complete honesty. “It’s nerve-wracking because I can tell her all of this, but I don’t think she’ll be on board unless she experiences it fully.”

“Well, I don’t think you’re gonna get the full experience better than at a Live Quarterly Meeting. It’s member-exclusive, but we like to provide a one-time offer for non-members to try it out.”

There it was again. The Live Quarterly Meeting. “I’ve been hearing that all around. What is that?”

“Our biggest event. We do it four times a year, and all our members come from around the world to catch up with each other and learn new content from RJon and other guest speakers. It’s really something you and your wife should experience yourself.”

Francisco processed what the coach had said, strongly considering to go to this Live Quarterly Meeting. Francisco replied, “I just need to check my schedule....”

“Tell you what,” the coach said, “Go to the LQM. Take your wife with you. You can pay for the flight and the hotel, and the admission for you will be free this time. If you and your wife love it and agree to sign up in that weekend, awesome. I’d tell you it’s a great investment but just experience it yourself, and you’ll see. If you and your wife feel this is not the way to go, we’ll refund you the amount you paid for your flight and hotel.”

‘What a gamble,’ Francisco thought.

While Nicole had no involvement with running the law firm, the success or failure was one very critical thing that affected her life as well as their children. If the law firm sunk, so did the house they lived under. If the law firm sunk, Francisco wouldn’t be the only one to struggle.

Thus, it was equally as big of an investment for her.

That was his positioning to her when he brought up spending a weekend at the Live Quarterly Meeting. “There’s still another month, so I think we’ll have time to find someone to watch the kids for that weekend,” Francisco said, lying on the bed in their room. “I really think this is a good idea.”

Nicole stood just a few feet from Francisco, cleaning her face before bed. “You sure we’ll get our money’s worth from this?” Nicole asked. “This is such a risk. We’re gambling.”

“It could be. It’s worth a try to find out. They’ll refund our stuff if we’re not going to sign up that weekend,” Francisco replied. He reflected on one of the mantras of How To Manage: find opportunity out of risks.

“I don’t know, Francisco. I feel like there’s something missing. We’re diving way deep into this when I don’t know if we even need it.”

“I’m terrified too, Nicole. But the way I see it, either I sink with the firm trying to swim on my own, or I make the investment to get these guys to help guide me towards the right direction.”

Nicole sighed. Francisco at the sight of her stressing because of his endeavors. She shut her eyes, and nodded her head. “Okay. You’ve been through this more than I have. I trust you’re leading us in the right direction.”

“You said before there has to be a way. I think this is it. Thank you for trusting in me.”

On the weekend of the event, Francisco and Nicole flew from Arizona to Dallas for the LQM. They resided in the Fairmont hotel where the event would be based in. That night, they allowed the nerves to set in. Despite of what Henry told Francisco, it was still unpredictable of what he would actually experience.

Would it exceed his expectations? Or would it be a complete scam?

Then, cue day 1 of the Live Quarterly Meeting.

Francisco and Nicole headed over to the Fairmont’s auditorium area in the early morning, making it just as the doors to the stage room opened.

Everyone took a seat, as the initial sessions include a rampant peak of high energy as dozens of law firm owners ran into the main event room to take their seats. Whether it was members gleaming smiles, or others etching notes onto their notepad, the atmosphere was full of positive energy.

The event also allowed members of How To Manage the opportunity to celebrate their successes from last quarter. In the conference rooms, guest speakers shared their tips to double the annual growth of their small law firms' revenues.

On the breaks in-between, Francisco and Nicole interacted with some of the most brilliant, kind-hearted, high-performing, like-minded peers in the small law firm industry. This event was simultaneously a time of celebration and learning.

Francisco questioned, where else has he seen this amount of like-minded people in one setting with this manner of camaraderie? Never. Not even law school brought this kind of energy. It was the equivalent to the super bowl, albeit exclusive to law firm owners.

Out of these great attorneys, Francisco met Heather Quick, a member of How To Manage, and her husband Mike.

"How are you guys enjoying yourselves?" Heather asked.

"It's been lovely," Francisco replied, "Our first time here. The energy is always this...what's the word I'm looking for?"

"High?"

"Infectious?"

Heather laughed. "Yes, it can get pretty infectious. I always arrive here with high energies and leave with even higher. Coming from someone who's been through it a few times, you're gonna love it."

While Heather Quick attended several LQMs up to this point, her husband Mike only heard about the content from past meetings. Like Francisco and Nicole, this was also Mike's very first time actually experiencing the content.

In-between sessions, Francisco and Heather discussed where their professions resided, how much their firms have changed over time, and particularly, Heather's experience with How To Manage.

"There's a lot of things," said Heather, "and I think you're definitely gonna experience that if you take the leap to join."

"Of course," said Francisco.

“But if there is one thing...you’ll learn how much better it is to have your spouse involved with you in events and decisions regarding your law firm. And I mean everything.”

Francisco squinted and blinked to process what it was that Heather was imparting. The law firm was his business that funneled income into the household. So, of course, the firm’s financial health would affect his family, including Nicole, depending on its success or failure. But, and this was with no offense intended, Nicole didn’t know much about Francisco’s business, to begin with.

“What do you mean?” Francisco asked Heather for clarity.

“I’ve always told my husband the stories of what I learn here,” Heather explained, “and he would find it interesting, nod his head and all in agreement. But, now that he’s here, his demeanor has changed. He’s more inspired, more engaged. That’s what the content brings. He’s already been telling me earlier today how he can see some of this for his own implementation towards his business. To have a different perspective from your other half, someone that brings in rational thought that you didn’t catch onto is a blessing.”

“I never thought of it that way.”

“We have three kids, so that’s mostly the reason why he’s never tagged along, and I used to feel bad for leaving him alone with those little monsters,” she laughed, “but now that he’s here and based on his expression, he knows just exactly the type of stuff I’ve been learning.”

By the time the LQM ended, it was a clear decision to invest and join. In the long run, Francisco was confident that the gears would turn into a machine. All that mattered was putting the work with the ideas he’ll learn over time.

But before he proceeded to confirm he was officially signing up, Heather’s words resonated with Francisco. If he wanted to Nicole to be a part of all the decisions, she deserved to know everything. Even the stressful ones.

As Saturday’s sessions concluded, Francisco brought Nicole to the side.

“That was amazing,” Nicole said, with a scrawled notepad in her arm. “Seriously. I got so much written down here, maybe it’ll help you out.”

Francisco smiled, holding a notepad also scrawled with notes. “I can’t wait to try it all out. Listen, I wanted to talk about something with you.”

“What is it?”

“I had a conversation with Heather, and she made me realize that I need to include you in every conversation no matter how stressful. It has to do with the house.”

Nicole blinked, registering the sentence. Her mouth fell agape. “We’re not...the house isn’t...” she inhaled and exhaled.

“The house is fine for now. And for context, I measured the expenses for this trip and the workshop. We’re not going under. But...I’ve got 3 months to fix this, Nicole.”

The notepad fell from Nicole’s hand. She stared down at Francisco, until chewing on the tip of her thumb, forcing herself to break away the eye contact. “You were so sharply adamant about this. It adds up now.”

Francisco’s breath turned thin. “I’m sorry, Nicole. I didn’t mean to hide it in a bad way. I saw my stress on you, and I didn’t want you to feel any more of what I felt. I...”

“It’s okay,” Nicole interjected. She nodded, reassuring Francisco. “It’s okay. I understand, the more I’m registering it. The stress is...it’s at an all-time high. Just...don’t do that again. We’re a team.”

“You’re absolutely right. I also want you to be a part of the choices I make in my law firm. It’s only right as we’re a family. We’re in this together.”

The two embraced for a hug. “Any other conspiracy secrets I should be aware of?”

“Nope.”

“You’re 100% sure?”

Francisco chuckled. “None at all.”

Francisco took the leap and joined *How To Manage*. With Nicole by his side, and the pool of resources available by *How To Manage*, he felt unstoppable. This was going to be the fiery sparks that would ascend his law firm into a volcanic powerhouse.

Thanks to the principles he learned at the LQM, it was clear to him just how important it was for her to be involved in all these major business decisions, workshops, quarterly meetings. Even the conversations that would inevitably invite stress into their lives.

Upon his inauguration into HTM, he was assigned a coach. From here, Francisco was once again greeted with Henry. Henry reached his hand out towards Francisco. “Looking forward to working together, Francisco,” Henry said with a smile. “Glad to have you on board.”

Francisco shook Henry’s hand. “Likewise, Henry. Can’t wait to see where the future takes the firm with your help.”

Lesson 2

No Stops Here. Just Do It.

When Francisco first opened Keystone Law, one guiding principle he set his firm on was to never scare or confuse his clients. To his best ability, he constantly imagined himself in the clients’ shoes, ensuring that they would be fine in whatever he shared with them.

Many times throughout the duration of Keystone Law, Francisco hesitated on his plans, analyzing each detail to make sure the firm’s guiding principle was reflected properly.

After the LQM, Francisco and Sondra’s morale catapulted to an all-time high with the knowledge he learned and the announcement of Henry joining the team as an acting CEO to ensure Francisco was on his path to success.

Lead generation, campaign funnels, case consolidations. The knowledge was invaluable, and even overwhelming to the degree of Francisco was unsure of where to start first, like driving through fog with no headlights. Thankfully, this is where Henry came in.

“Why don’t we get started with a meeting to go over all the details of what’s covered?”

Francisco agreed. On their first meeting together, Keystone Law’s current standing was discussed. Henry carefully went over the details, from the metrics and current forecast to the resources at hand.

“Okay,” Henry said, “Here’s what we should do. We’re going to generate buzz about the law firm, but we’re going to target to our specific audience. We’ll start with a lead magnet on Facebook ads, and frame the ad copy around the prospective client’s fears. We’ll follow it through a campaign funnel to acknowledge those fears. If we have any videos at our disposal, now is the perfect time.”

Majority of Henry’s advice was what Francisco had recently learned, and it resonated with him at first. But, the more he thought about it, the more uncertain he felt of the process. The words ‘client’s fears’ rung in his mind.

The guiding principle echoed in Francisco’s mind: never scare or confuse clients.

“Henry, I’m sorry but I’m gonna have to disagree with you on that. I think we should frame the wording differently,” said Francisco.

Henry raised both brows in response. “A campaign funnel could prove to be effective, Francisco.”

“I refuse to go that route.”

“Do you mind if I ask why, Francisco? Have you tested it before?”

“I admit, I haven’t tested it before. But, I’m not here to incite fear in my clients, or attack them with fear. Nor am I trying to confuse them into signing up with me.”

Henry nodded. “That’s completely fair. Perhaps I misworded it, and I apologize. Let me explain: We are not inciting fear, nor attacking them with fear. We are acknowledging the client’s problem situation.

Francisco’s eyes lit up, curious as to where Henry was leading with this.

“In order to attract our necessary audience, we need to not only acknowledge the problem, but provide them with the right wording that states we have the solution needed for them, and the experience to back that up. Does that make sense?”

Francisco nodded. “I never thought of it that way.”

“And that’s what I’m here for!” Henry laughed. “I am in no way trying to steer you off course. And I am also in no way of taking over your law firm. This is a starting point. I want you to eventually begin crafting your ideas. We can workshop it, but ultimately *you* are still the captain running this ship.

“We’ll measure the data of everything too, and see what’s working and what isn’t. Because if we’re not seeing the data, then it’s all useless and we might as well be playing darts with a blindfold.”

“That makes complete sense.” Francisco thought about his guiding principle. Maybe his frame of mind towards the principle was completely wrong. Maybe that was part of the reason why he was unable to bring in more clients. The misinterpretation of his own guiding principle held himself back.

A part of Francisco still expected to see all the campaigns fail. Trying his best to cast fear aside, he informed his team of the first steps of new implementation into the law firm. They initiated the ads, created a web-page, set up the emails with proper copy, and direct sales letters. They measured the data from each campaign and moving with follow-up automated replies.

What presented good engagement and turnaround stayed and was optimized further with bigger spending budgets. What presented bad engagement, even if it was an initial favorite, was scrapped. No excuses.

The good news was that majority of it was working. Francisco coordinated with his team, communicating with clients that opted in to a consultation, and locked in contracts one after another.

By April 2015, two months later, Keystone Law Firm achieved their biggest quarter. Francisco shared the news with Nicole, and then Henry afterward. He celebrated with his family over the fact that the house was safe, and so were they. They were moving out of the danger zone.

Francisco wanted to break free, and he did. Now it was important to keep things on track. He refused to let this momentum stop.

If Francisco were to take a lesson out of this moment, it would be one thing: do the things the coaches asked of him and the rest of his team. Even if it seemed uncomfortable and way out of line with normal operations, put your head down, follow through, and just do it. He expressed his compliments to Henry and apologized for acting out of fear initially. The fact that the months weren’t just coming from one lucky windfall case showed him what was possible with the right business plan and strategic quarterback.

But now, Francisco’s pride in his success was met with the trepidation that this month’s numbers would be nothing more than a fluke. The steps were there, but Francisco still questioned how could he repeat something like this again?

As the months rolled on, he was proven wrong. May brought another breakthrough record, as did June, and so on. But the fear didn't dwindle for Francisco; it amplified. Unable to shake it off, this inner turmoil frustrated Francisco.

Francisco continued attending the workshop sessions hosted by RJon Robins. In one session, Francisco had addressed his breakthrough months and the inner turmoil coinciding with it.

“Success comes in incremental stages,” RJon explained. “And, with the arrival of each stage comes the sensation of discomfort and uncertainty.” Each emotion RJon outlined through these stages – trepidation, frustration, aimlessness, and more – were emotions that immediately hit home for Francisco.

They were not emotions only known to Francisco. They were emotions every business owner would be guaranteed to experience and must overcome to succeed.

RJon mentioned how soon ‘million-dollar’ months would come to his own business if he began acting in a consistent way with a business that receives million-dollar months. Like any other business owner, he would have to change his mindset to continue his business’s momentum.

Having someone else identify those emotions with such precision and showcase the future stages to expect and the emotions that will come with it fortified Francisco’s confidence in himself as a law firm owner.

In that essence, Francisco realized that he and his team had to think and act differently to achieve results.

The team stopped analyzing the days and weeks ahead as it only enhanced the sheer hysteria that the numbers would align just right to meet goals. Instead, they began forecasting the bigger picture through quarterly months and annual measurements. If the fear was going to stick around, Francisco was going to not let it overwhelm him.

Lesson 3

Can Someone Take This Email?

There are some rare feelings of sweet reprieve in life. Like the period after marrying the love of your life. Or the peace after growing your law firm to a stage that you never thought it could reach. Or the strong sigh of relief after going through a cluttered inbox of emails.

Francisco was finally achieving a work-life balance. The days of working 12+ hours were becoming nothing but a memory of the past struggles of his law firm.

But as his law firm grew, gone were the days that Francisco could find that relief in a clean inbox. In his day-to-day schedule, Francisco typically spent two to three hours per day tending to his inbox, reading through emails, and responding to most of them.

To spend nearly a third of his time tending to emails was a huge time-suck. And to see emails continuing to flood in was forcing him to lose his mind.

One night at dinner, he shared his dilemma with Nicole. “Is this going to cause the firm to crumble?”

“Well, no,” Francisco replied, “It’s just a pain in the ass.”

“Then it sounds like you just need to adapt to this, being at the stage of growth you’re in now. See this as a new expectation.”

Francisco reflected on RJon’s words about acting like a law firm owner who’s making the kind of revenue Francisco was making at this point. Maybe it was true for this situation. “You might be right.”

“Have you asked your other law buddies? See if they have the same issue?”

“Ah,” Francisco scrunched the skin on his forehead, stupefied by not having used HTM’s forum as a resource. The forum was a perfect spot for Francisco to share his issue. Maybe someone did find the right system to handle emails. “You’re a genius. I can’t believe I didn’t think of that sooner.”

“Of course, it’s why I’m here,” Nicole smiled.

The next day, Francisco made a post on the forum expressing his issue. Later that day, Brooke, a How To Manage coach, shared her email management system. She elaborated on her policies for emails. “My policy has three parts,” she wrote:

“1. The Sundown Rule. I read (and reply if necessary) to every email before leaving the office. If you ever get emails from me at 8:30, it’s because I have to address all the emails before I leave the office for the day. This does not mean I have to solve every problem, edit every document, or fill out every spreadsheet before I go home. Just read and acknowledge receipt if necessary. I often send emails saying thanks for sending; I will work on this XXXX. This leads us to the next part of my email policy.

“2. My Inbox is my To-Do List. If an email is sitting in my email box, it is because there is a task associated with it. If it is a purely informational email, it gets filed or deleted once it has been read, depending on the email. But if I must DO something, it stays until the task is complete. Even if that means it stays for a long time [...] I don’t leave the office with more than 50 unread emails (also known as To-Dos). I have been at the LQM and have not logged onto my email for about 36 hours. I just checked 75 emails, 11 unread. I have to deal with 25 emails before I can “finish” my working day.”

This helped clear Francisco’s idea of organizing, sorting, and dealing with his email schedule. But the issue at hand was policies to apply to the whole staff and not just the individual, as the policies surrounding emails felt too broad and vague.

Francisco sat at his desk, thinking, brainstorming on a possible way to handle this. It had to be precise and controlled, like the rest of the areas of his business. Francisco imagined the worst-case scenario of having to fish through seas and seas of email folders for one specific email and not being able to do so unless he took 12 hours out of his day.

Could he actually delegate someone to handle his emails? Or would that be too hyper-controlled? Would that lead to a sense of invasiveness in his private matters?

Bob B, another Bubblemate, shared his email system. “I currently manage my own email. But you should evaluate each email – Do, Delegate, or Delete.

“I have auto-rules set up in Outlook to put email from certain organizations, networking groups, legal and advertising news and information, and monthly newsletters into the appropriate folder without first seeing it myself.

“When viewing email, I sort everything into two categories:

(1) Urgent things that need to be handled by me within 24 hours, and

(2) Action Needed emails that need a response or an action that can be delegated, or a miscellaneous action.

“After responding to the email, I store it in a folder. I have several folders, but the primary ones are:

- Client email
- Administrative – office supplies, bar dues, invoices
- Organizations, news, and monthly newsletters
- Marketing
- Networking
- Potential Clients
- Junk mail

“What’s important is delegating. You’ll be able to save so much time by analyzing what’s a priority and what can be put aside to someone else’s plate.”

Simple decisions led to massive, positive results. Francisco now had an additional two to three hours of his day to focus on tasks IMPORTANT to him, much more important than having to answer a catalog of emails.

Proper delegation, much like time management and a clean-cut system, is an important aspect that many, including Francisco, overlooked.

Lesson 4

Searching for Motivation Outside of Running a Law Firm

On the start of his morning, an ordinary day in March 2016, Francisco entered his usual routine, arriving at 9AM, armed with a thermos of coffee, greeting his team before heading into his office. He outlined his agenda for the rest of the day, from handling tasks to preparing for meetings and checking in with Henry, finishing by 5 o’clock.

He began his initial daily tasks: Sorting through his inbox, reviewing immediate items for approval, and checking on the status for each client. Suddenly, his eyes felt heavy. His posture slumped over, applying uncomfortable pressure to his lower back. His thoughts dragged as all he could focus on was the comfort of shutting his eyes.

Urging to keep working, the same habits returned a mere 2 hours later. And, due to this lackluster energy, Francisco dragged behind on his work. The coffee normally kept him awake, complemented with no more working late into the night, losing essential hours of sleep. But his body felt more sluggish than ever.

Francisco tried chugging another cup of coffee, with the caffeine's high energy only working on Francisco for an hour. At its crescendo, Francisco's energy crashed.

More time passed, with Francisco unable to keep up with his usual moderate pace. The workload of the cases were beginning to fall behind on schedule.

Francisco's heart dropped. If he didn't meet the cases in line with the firm's tracked schedule, then either revenues would drop, or last-minute work overload would ensue to meet those deadlines. The last thing Francisco wanted was for the constant fear of meeting goals to return. To prevent that, he needed his natural energy to return.

With a struggle to find the answers on his own, he posited this question to the bubble of HTM. And soon, many of Francisco's Bubble-Mates responded with their own stories.

Many of the bubble-mates came to the consensus that every person's *why* for exercising is unique. It could not be simply imprinted by uttering the right string of words that releases the right amount of dopamine to enter an incredible *Rocky*-esque montage.

Sarah P., a fellow member of HTM, explained that treating her training programs as a priority bled the healthy lifestyle into her business. It transformed her behavior to have better focus at work and be more fearless when it came to making certain decisions and being direct with clients about hiring her. She added that there's never a right time to start exercising. It takes a push.

"Through doing this mindset, here's what I learned, and I recall this being taught at one of the mindset workshops: every action we take or thing we invest in is something our subconscious has chosen to value over anything else. It's understanding this where I began to question that out of what I'm doing, what are the investments that will benefit me the best in order to achieve my goals?"

Phil G., another fellow member, opted to join something extreme, akin to the Spartan Race – an extreme obstacle course that required a lot of training and preparation to succeed. A concrete goal like this coerced him to train 5-7 hours a week to prepare for success.

All the points were rational. They were, in fact, good. But it still wasn't enough to convince Francisco.

Henry challenged Francisco by asking the question, "What is healthy going to do for you? Is your tiredness hindering your productivity? If so, would exercising improve your life beyond productivity? And maybe look at it this way, too: What was being healthy in the past NOT doing well for you?"

Francisco explored this question further. Initially, he was unsure of how to respond to the question. Healthy was going to do all those common-sense things mentioned earlier. But for Francisco, it wasn't enough.

He arrived home later that evening, spending time with the family and then chatting with Nicole outside in their backyard. Francisco's mind spaced in and out of the conversation, struggling to keep his eyes wide open.

"You alright?" Nicole asked.

"I'm sorry, I'm really tired today for some reason."

"Is something wrong with the law firm?"

"No, no, things are on track right now."

Nicole nodded. "Maybe just a rough night. Let's sleep early."

Francisco agreed, proceeding to settle in for bed with Nicole. But in the back of his mind, all he could think about was the cases piling up. The sooner Francisco could find his answers of being active once again, the better it would keep him from constantly panicking over the potential derailing of his law firm.

Francisco focused on the memory of his workout routine in the past, a couple of years before joining HTM. Francisco would wake at 7 in the morning, waking the kids up and making them breakfast as they prepared for school while Nicole slept soundly.

By 7:45 AM, Francisco jogged through the suburban neighborhood, fast-paced music blasting through his earphones, honing in his adrenaline through the roundabout circle, finishing 2 miles.

Once he arrived back home at 8:15 AM, Nicole had already departed with the kids for the rest of the day.

He took the next hour to prepare for work, washing away clung sweat with a cold shower. Dressing into his work clothes and preparing breakfast with coffee. Then, it was on to work.

By the time he arrived back home at 6 PM, the pains of hunger and sleep began to impact him. Nicole and the kids were home by then, with dinner ready to be served. Francisco settled in and joined them at the dinner table for the next half hour, eating while asking how everyone's day went.

By the time he finished his plate, Francisco spent the next hour and half with Nicole and the kids watching TV. until his mind turned to fog. That was his signal to go to bed. "I'm gonna shower and head to sleep," said Francisco.

"It's 8," said Nicole.

"I know, but y'kno I woke up early and now my body just wants to settle in and doze off."

Nicole shrugged, "Well, okay. I still have some energy, so I'll see you in bed later tonight. Goodnight."

"Goodnight."

For every day, that was the routine. The weekend gave them a little more time if Francisco wasn't focusing on the law firm. At times Francisco felt a rift between him and Nicole, but he chose to brush it off as his mind playing tricks on him.

Francisco cherished his family. He chose this routine for the sake of them. To be healthier so he could grow old with his family. Become more financially stable to grow peacefully with his family. This was all for them, he told himself.

After 3 months since beginning that routine, Francisco found Nicole laying in bed one evening as he was about to go to sleep per his usual schedule. "Tired today?" Francisco asked.

Nicole replied, "Yeah, I...Honestly, I don't know." Her cold tone nerved Francisco, opposite to her usual warmth.

"Everything ok? Did something happen?"

“I...I don’t know.” Nicole averted her gaze away from him. “Haven’t you been feeling different the past few months?”

“I mean, I’ve been pretty focused with work. Is there something I didn’t notice?”

“That’s the thing, Francisco. I’ve been trying to understand you and your routine for the past few months, but I can’t handle it anymore. You’re gone in the mornings, I’m alone with the kids. You’re tired by the time you’re home, and I have to push you in having any conversation bigger than small talk.”

“Has it been that critical?”

“You know I wouldn’t be making this big of a deal. Think about it.”

Francisco felt it in the pits of his chest Nicole was right. His brain had been so clouded, he couldn’t even remember more than half of the stuff Nicole was discussing with him about in the recent past. It was even difficult to keep track of his work’s notes.

Nicole continued, “We’re living two completely different lives at this point.”

Francisco leaned against the wall. Her words were a punch to his gut. He thought about every time he saw her sleeping peacefully in the morning. It was a comfort that Francisco now realized was an illusion.

That wedge Francisco naively created terrified him. The main thing he wanted was a happy life with Nicole and their children. The mere thought of losing them left him devastated.

Francisco approached Nicole “I’m so sorry, Nicole. I thought we were perfectly fine. I’m not blaming you either at all, I just...I didn’t know. I never intended to make you feel that way.” He wrapped his arm around Nicole. They embraced for a hug.

After that, Francisco promised to do everything in his power to never form that rift again.

Back in the present-day of March 2016, Francisco realized it was that mental wedge from years ago that held him back. Every time he thought of the idea of pursuing a workout routine, the impulsive fear immediately sparked from within. Innately, he didn’t want to hurt Nicole again like before.

The next day, Francisco shared his revelation with Henry and the bubble, unsure of how to veer away from this wedge.

RJon provided his input, explaining he found swimming to be the best type of exercise for him because of the versatility it provided. He was able to implement audiobooks into his routine alongside the opportunity to work out with his wife Ale, who is also an avid swimmer. He found ways to make time for both without sacrificing one or the other.

And that was the example Francisco needed for it all to make sense. An activity that prompted physical exercise, but also allowed him to spend time with Nicole. What motivated Francisco was for not only him to be healthy, but for his entire family while spending time together.

Arriving home and after finishing dinner, Francisco and Nicole allowed the kids to play as they stepped outside to the backyard. “Hey, there’s something I wanted to talk over with you,” Francisco said.

“What do you wanna talk about?”

“It’s about exercising. I’ve been feeling like shit for the past couple of days. I’m dragging behind at work, which we’re fine right now. But I’d really like to bring back a routine where I can exercise again. But,” Francisco shifted his tone, “I don’t want to lose my time spent with you. I don’t want to repeat what happened all those years ago.”

“You’re not wrong that we should be exercising more. But, look, I’m working too while focusing on the kids with their school and everything. I don’t know how we can make time for it. Just feels like everything is so...busy. And I do like the sleeping schedule we have now. I feel great. I’ve been feeling great compared to those sleepless nights.”

Francisco nodded. He then recalled the lesson Sarah shared. “I understand. I want us to be able to find a balance where it’s not sacrificing something like sleep since that’s good. Someone in the bubble explained to me that every choice we make has a value. We’re subconsciously giving something more of priority because we are saying it’s valuable to me. Maybe there’s a reason, maybe there’s not.

“I think that we should examine our daily routine, and see what’s actually benefitting us, or helping us improve. Exercise will benefit us in the long run, that’s a given. Perhaps we can sacrifice something to make room.

“I never looked at it that way,” Nicole replied. She sat in silence, thinking for a few seconds before speaking again. “Remember when we first started dating? Occasionally we would go on some of the hiking trails around here?”

“I do remember that. I remember slipping and busting my ass one time. That was fun.”

Nicole laughed. “I would like that again, the hiking trails. Or walk different routes, a light jog even. Maybe we can wake up 45 minutes earlier, while the kids still sleeping.”

“You’re willing to lose sleep?”

“If it means benefitting from this, absolutely,” Nicole smiled at Francisco. “I want us to be healthy.”

Francisco smiled, “It’s a deal, then.”

This level of personal input was not something Francisco could’ve found so easily had he not had the community of *How To Manage*. What was fantastic at this point was that he felt even less alone about his dilemma.

Francisco and Nicole have been in the best shape of their life, thanks to their determination to balance family time and self-care. Of course, being a part of this kick-ass community also helped.

Lesson 5

The First Real Vacation in Years

March 2016 was a moment Francisco had been dreading since October 2015. He had hoped, prayed even, that this moment would feel better. But all Francisco could do was silently hyperventilate in the stall of a pristine, white airport, surrounded by stampedes of footsteps and click-clacks of luggage wheels turning.

What was this feeling of dread and panic stemming from? Vacation.

Francisco was going on vacation with his family to Disney World in Orlando, Florida. And for the first time in many years, he was going on vacation for ten days, completely isolated from his law firm. No communication whatsoever.

This was a mandatory request demanded from *How To Manage* back in October 2015 when Francisco attended a business planning workshop and showed his schedule.

It was made clear that Francisco needed to emphasize the 'life' in a work-life balance. As much as he presumed to have achieved it, being able to spend weekends without worrying about the firm and taking the time to be physically active, Francisco didn't fully trust his firm's system enough to let it run on its own. Even with now having a team of ten people, grown over the years from his initial 2-man team, Francisco had his concerns.

In order to alleviate that issue, Francisco had to experience being away from the office directly. He was required to be away from the office for ten days. Ten days without hearing a single thing about how things progressed at his law firm.

'This is such bullshit,' Francisco thought in the restroom stall, buckling his head into his knees and counting his breaths to try to regain composure.

He reflected on the recent January 2016 LQM, where he once again expressed his fears and frustrations to Paul Ghannouni, a fellow member. "The cash flow isn't ready for my absence. Neither is the damn sales system, nor anything really. I don't know, Paul. I'm seriously not personally ready for this. AT ALL."

Paul Ghannouni nodded and took a sip from the cup in his hand. He turned his face to stare directly at Francisco. Kind, welcoming, but firm.

"Francisco," Paul replied, "How is the 'future you' going to reflect on this situation? Is he going to look back in five years and say, 'Francisco, you shouldn't have taken that vacation!' Or is he going to look back, not even thinking about the problems that the vacation MAY have caused and say, 'Man, it was great to take that vacation in 2016 even though I initially hated it.'"

Francisco was left stunned by Paul's speech that embodied how stubborn Francisco was being.

"Or even better," Paul continued, "it might be: 'I'm glad we can take 30 consecutive days of vacation now, and it all started because I was willing to take those ten days off in 2016 when I

was willing to see the possibilities.’ Trust me. It’s possible to leave the office for ten days with the right tools prepared. Any seasoned member here will say the same.”

Francisco admitted his wrongs. “You...you nailed it on the spot, man.” The system Francisco and the rest of his fellow bubble built in their respective law firms was intended for them to be able to step away and enjoy life without the office combusting into flames.

But even with Paul’s great advice, Francisco’s fear still grasped control of his train of thought. Even days before the week of vacation, Francisco found himself crying a few times from stress over isolating himself from his law firm. Part of him felt that he was being set up for the inevitable destruction of his law firm.

He triple-checked everything with his staff, ensuring all the Ts were crossed and the I’s were dotted. Still, that wasn’t enough to decimate the internal fear.

Francisco finally managed to recompose himself and re-joined his family as they waited to board the plane that would transport them to a land of tropical weather and theme park rides.

His hands twitched to go to his phone or laptop and communicate something with his team. A simple check-in and see how they were doing, how the numbers were looking, and whether or not the office was on fire.

Francisco’s oath prevented him from going past any breaking point. If Francisco couldn’t pull through with refraining from communication, how could he ever rely on his team?

How could he ever have peace of mind whenever he was away from the office?

How could he ever truly spend time with his family if he was constantly worried about the state of the law firm?

His mind was turning into an inner child on the verge of a temper tantrum, and it wasn’t due to waiting in long lines at Disney World. It demanded Francisco should absolutely break his oath and check-in with the office.

But Francisco knew, deep down, breaking this oath would not make him into a better law firm owner, nor a better individual, but the polar opposite. It was time to tell those pandering fears in his mind to shut up. ‘Everything will be fine,’ he affirmed. ‘It will be.’

Day 1. The plane landed in Orlando, and Francisco's family arrived safely at the hotel that connected directly to the theme parks of Walt Disney World. The promise of a plethora of activities kept his kids excited over starting their adventure into the theme parks tomorrow early morning. For now, they all went to the hotel's pool to take a dip in the waters.

Francisco's fears subsided. The full-lit sun warmed his body, muscles relaxing. He imagined the systems of his firm running alongside his staff

Days 2, 3, 4, and 5, Francisco's family walked through the parks of Magic Kingdom, Epcot, Hollywood Studios, and Animal Kingdom. Every décor, ride, set-piece, and character did their service in immersing Francisco in their distinct atmospheres. It prevented any relapse of checking in on his law firm.

With the Disney parks done, there were still a few days remaining. Francisco decided to take full advantage with his family and proposed to check out other theme parks like Sea World, Universal Studios, and Islands of Adventure. Nicole agreed, and the kids were nonetheless more excited.

Day 6 knocked out Sea World, Francisco's clothes getting drenched from one whale splash too close.

Day 7 cleared through Islands of Adventure, where Nicole got one of her favorite photos with Captain America.

Francisco and his family spent Day 8 at Universal Studios. Like the days before, the forecast was filled with excitement and thrills. One of the first rides they waited in line for was The Mummy. As the family made their way through the crowded line, the kids tended to their game apps through dim-lit Egyptian architecture. Day 9 was their last day before having to leave back home on Day 10. Francisco and Nicole chatted, thinking about what to do for the last day in Orlando.

"That Ferris wheel we've driven past seems interesting," said Nicole.

"Yeah? Let me find out where that is," replied Francisco. He pulled out his phone and opened the browser app. In a few seconds, the phone's screen glitched from white to black to blue. Then, browser crashed.

Francisco squinted his eyes, puzzled over this sudden new issue. He swiped through his catalog of apps, noticing the response to his commands were horrendously slow.

Then, the screen flickered on and off once again before turning back to a somewhat responsive screen. Francisco stared at the screen. His mind jumped back to when he was drenched at SeaWorld. He recalled having his phone in his pocket. 'Oh no,' he thought, 'Did it get damaged? Now, after two days? Is that even possible?'

His hands trembled as he imagined losing his phone permanently, his one true form of communication. His only communication to his law firm. Francisco knew the phone number, but he knew Nicole wouldn't stand for Francisco to break his oath.

What if his staff needed help? What if they had to call Francisco or email him in these last few days?

Francisco shook his head. "Wait here with the kids," Francisco told Nicole, "I'll be right back." He pushed his way out of the line, sprinting out to the nearby locker area where patrons stored away any loose items before entering the ride.

He took his phone out, deciding he was going to call his firm to let them know that he may lose access to his email. Francisco typed in the digits. In the back of his mind, HTM and the other members that assured him everything would be fine were mere antagonists holding him back from growing his law firm.

His heart raced, and his fingers locked up with each press of a button. Ten digits, fully typed.

Francisco raised the phone to his ear. Ring once.

He needed to do this, he assured himself. The law firm can't crumble now. The second ring followed.

He hardened this action with the rationality that he was the one and only pillar.

Finally, the third ring. Time felt as if everything slowed down to a halt. The fog of panic cleared. Francisco envisioned himself as a frail person shaking uncontrollably, unable to stop. His eyes wide open, filled with white horror like a deer standing frozen in front of headlights. The light amplifying to a blinding intensity as it zoned in closer.

It was an awful mental image. Because that wasn't him. He knew he was better than this scared reflection. Before the call could successfully go through, he hung up. He tucked his phone away into his pocket and traveled back through the line to meet with his family.

After that moment, the phone acted perfectly fine with no glitches. Like if some essence of fate challenged Francisco's conviction to stick to his oath. And, he did.

Vacation continued onwards as normal, and when Francisco arrived back at his law firm, everything was fine. In fact, all necessary tasks were tended to with efficiency. Francisco stuck with the action that terrified him most, thanks to his dedication and the support of his community.

It was one obstacle that would make the rest of his personal life better. Especially when the 10-day vacations turned into 30-day getaways.

Lesson 6

The Hardest Thing I've Ever Had To Do...

Throughout the duration of his law firm's growth, Francisco's ever-growing team were becoming an army of superstars that would help catapult Francisco's firm higher. Francisco knew it took a great team and well-oiled systems to make this firm a success.

Sondra, an employee of Francisco's, worked for his law firm as his administrative assistant for the past three years. She joined the company due to not only her beneficial skill level at the time but as a friend of the family.

As Francisco's law firm grew over time, resulting in new roles and systems, Sondra's performance was declining. Her work turnaround lengthened, excuses were popping up here and there and everywhere, and her temperament began turning sour.

What made things worse was this declining individual was a long-time friend to Francisco and someone Francisco cared deeply about, along with her family.

December 2016, the time of the holidays, became a harrowing breaking point. Francisco realized he had to fire Sondra. Up until this point, Francisco have never had to fire anyone.

Having the conversation wasn't easy. In fact, Francisco was more nervous, jittery, unprepared, restless, and single-minded than he ever remembered being. He recalled not being this nervous the first time he spoke in front of a courtroom.

Francisco discussed the situation with Henry. "Is there any way to stop the nerves from going through?" Francisco asked. "Just an off-switch to get it over with?"

"I think you know as well as I do it's not that easy, whether the person on the other end is friend or no friend."

[mention the preparation; have a talk with Nicole; Francisco writing down his notes]

Arriving home early, Francisco and Nicole decided to take a walk around the neighborhood. Clouds covered the area in shades of grey, white and slate as the couple paced along the sidewalk, clean of snow.

"Tomorrow, I'm firing Sondra," Francisco said swiftly.

"What? Our Sondra?" Nicole asked.

Francisco nodded. "We've talked about this before, how I've been trying to coach her and get her to stay on track. She's still not performing on the level we need her to be."

"I was really hoping she would take the advice and improve. What an awful position to be in."

"The feelings are mutual. The more I think about, I also feel so damn frustrated at her for the position she's put me in."

"It all comes down to the business, Francisco. You did what you could."

A shiver fell through Francisco's body, but not from the cold. The thought of meeting with Sondra tomorrow made him want to freeze up and vomit. "I gotta prepare for tomorrow."

"Write down notes of what you want to say. Might help when the nerves start coming up."

Later in the evening, Francisco wrote down note cards of what he wanted to address to Sondra, from her failure to take advice to her poor performance being the reason for her termination. Thinking about this dreaded meeting for most of the night, Francisco only slept for a good three hours, staring down at his red-lit alarm clock on the nightstand.

Francisco arrived at the office an hour and a half earlier than normal. He sat at his office desk, peering through the window, waiting for Sondra to enter.

Half an hour later, she arrived, walking straight to her desk. Momentarily, Francisco's heart stopped. It was time to be done with it. Francisco couldn't push this off any longer.

Heaviness weighed down Francisco's legs, as if an anchor was tied to each of his ankles, with each step towards Sondra feeling heavier than the last. He pushed through it, speeding up his pace.

At Sondra's desk, Francisco caught Sondra's attention. "Sondra, come to my office," Francisco said to her, "There's something I'd like to discuss."

Sondra nodded, standing up to follow Francisco back into his office. Francisco gestured her towards the empty chair across from his desk. Both seated, Sondra blinked twice before asking, "Everything good, Francisco?"

A deafening pitch heightened. He stumbled to find the right sentence as he locked eyes with his longtime family friend. His lips moved, though his ears didn't catch anything but that pitch. He batted his eyes over to his note cards, visible and stacked on the desk's surface.

The next thing Francisco knew, Sondra exited the office, packing her belongings. Most of his memory blacked out.

Hell, he didn't recall ever reading the notes he wrote down aloud. The only concrete visuals he recalled was the Sondra's continuously draining expression, leading to her loss at words.

The regret immediately followed. Now, uncertainty lingered. 'Was this really the right decision? Could I have helped her more?' Francisco thought.

Francisco shared the news with Henry. "Sondra's out," said Francisco.

"How'd it go?" Henry asked.

“Well, I don’t remember most of it,” Francisco replied. “But I feel fucked up. I wanna go home and forget about this completely. I don’t feel like myself.”

“I know it’s hard to have gone through this. But let me say that soon, you’ll see how the team’s morale will now rise up because of this decision.”

Francisco shook his head. “I just ruined someone else’s life though.”

“That’s not necessarily true, Francisco.”

“How is that not true? In the middle of the damn holidays, too.”

“Sondra was not a good fit anymore for this team, or this firm. and the position was no longer a good fit for her, either. She would be dragging your law firm down if you continued keeping her on here. I guarantee this: Not only will the firm be on track again, but the team morale will shoot up.

“Try to look at the positives of these grim moments. Because in business, you will eventually reach a tough decision. It’ll be different and unlike any other tough decision you’ve had before. That’s what makes it tough. You cannot let those tough decisions defeat you.”

Francisco wasn’t fully convinced by Henry’s perspective. “Thank you Henry, but I need to clear my head.” Francisco replied. “Then, I need to look at these past policies of hiring and job expectations. I don’t want to fumble the ball again.”

“Go ahead. We’ll talk another day.”

Francisco exited the meeting and proceeded to look into the foundation of how his firm hired people initially. Looking deeper into their interview processes, he re-assessed how the firm would hire people in the future, being more specific in the key roles and responsibilities needed for every position. He also decided to add metrics and KPIs for other employees to keep track of their productivity. The last thing he wanted was to avoid another scenario like Sondra.

Growing from being a solo law firm owner to a small team of two to a team of ten, Francisco knew his goals needed to change to reach to more stages of success. Francisco didn’t want only himself to see success. He wanted everyone who stepped into Francisco’s team to flourish.

A couple of weeks later, after implementing new policies that would overwrite and improve the former ones, Francisco was beginning to feel better. He re-affirmed that he was in this business for the sake of growing and helping others, not just for selfishness.

Months later, Francisco checked in with Sondra. Sondra admitted she was feeling worse as time went on at his law firm due to personal reasons and feeling stagnant. She also admitted she should've spoken to Francisco about it but never felt comfortable, as if there was never an opportunity to talk, and there was no other job for her to fall back on. But now, Sondra found another job where she's finding happiness in both her job and her life once more.

The same heavy burden that clung to Francisco ever since the conversation between him and Sondra months ago lifted off his body upon hearing her say that. In moments like Sondra's situation, it became clear that people would bide their time until something better came along. To fire her was also a benefit for her to find happiness once more. It was the push she needed.

Now that Sondra was no longer an employee, the positivity of his team's attitude increased tremendously (Something that Francisco finally understood from Henry's advice).

It was an easy night-and-day comparison. Even work turnaround increased once more. Now, for Francisco, it was important to look forward and focus further on making the business better in every area. [<- expand everything in red?]

Lesson 7

The Monster vs The Machine

In May 2018, Francisco attended a mindset workshop hosted by RJon. Here, RJon spearheaded a discussion regarding the four ways to overcome stagnation and foster growth through a business. This discussion started as an email from a fellow member suffering from self-sabotage.

RJon clarified the actions for each of the four ways to foster growth. It followed as such:

“1) Vision board – A *vision board* will not push you past your terror barriers and empower you to go beyond anything and everything you've ever believed possible for your life. A *vision board* will not protect you from the slings and arrows that will come your way from well-meaning (and not so well-intentioned) friends and family who will recoil at, reject, criticize, and condemn you

for doing the things that must get done to break free from the co-dependent bonds that bind you so that you can be free and know what real freedom feels like.

“A *vision board* is a toy. And it’s a dangerous toy because right there in front of you is a visual reminder of **everything you’re actually scared to death of achieving**. So, it must be used with caution. Unfortunately, too many treat it like a game.

“With all that being said, a vision board, when used correctly, is a useful (and fun) learning exercise. But if you can’t hold the vision in your own mind without that kind of prop, you’re going to be in trouble. Because the challenges don’t come announced. The moments of doubt that derail you and knock you on your ass don’t usually occur on schedule when you can plan to be near your vision board.

“Too many people who sit around making vision boards think that’s all there is to it. They’re rank-amateurs, rookies at this business of battling your subconscious in the fight for your full potential. I’m fully aware that we have had some members depart HTM for the easy path of “let’s all just sit around and make vision boards.” I don’t stop them. They need to learn the hard way that a vision board is a tool, not the answer.

“Should you make a vision board? Yes. Should you count on your vision board to protect you from the monster when it comes? The monsters we battle with eat vision boards for breakfast.

“2) Incremental growth – This is “conventional wisdom.” It’s far more comfortable, less scary, and far more predictable.

“3) Create a monster – Only a naive fool or a hardened genius unleashes a monster intentionally. I don’t blame anyone who knows him or herself well enough to know you’re not yet ready for something like this. Consider the Mindset Tune-Up instead.

“4) Create a machine – A machine is just a system – a system around marketing, a system around sales, a system around production, and a system for people. There are also systems around the physical plant and one for financial controls. And most important of all, there’s a **system for managing your goals, your progress, and your personal development**. Unfortunately, many people think they can manage with just the personal development system and ignore the rest. That seldom works out well in the end.”

Francisco raised his hand, opting to ask, “I would like to know a little more about this monster, RJon. What is it?”

“Think of your mind, specifically your subconscious, unleashing something terrifying,” RJon replied, “It chases you down, either pinning you to a corner, frozen in fear, or forcing you to run away and find shelter. Fear is many people’s reaction. Because they have not a single clue that their subconscious has released this monster to force them back to a place of familiarity.

“Thus, the Monster is a very dangerous thing as it prevents you from growing. But, if you overcome it, you will ascend to a higher stage than ever. You can even create a Monster intentionally to get to a larger stage of growth, be it personal, professional, financial. Anything.”

Francisco realized that this kind of subconscious, this Monster, had always clung to him. It hesitated his plans with Henry. It kept him from being away from the office with a peace of mind. It held him back from returning to a healthy routine. And so many things within these past years of growing with the law firm.

“But, let me reiterate,” RJon continued, “only a naïve fool or a hardened genius unleashes a Monster intentionally.”

By June 2018, Keystone Estate Planning had broken every financial record so far in the firm’s course. The firm was seemingly on track for success. Seemingly.

Oddly enough, expenses were outweighing the reported data. And spending income was also not aligning with what the firm should have. At first brushing it off as a fluke, Francisco finally decided it was time to look further into the issue.

He used the notes he accrued at *How To Manage*’s financial workshops as a reference point to decipher the potential areas of error. As he scanned through spreadsheets, he finally realized there were missing indicators. Average case values, new leads, number of consults sold. Those were just a few examples.

After examining the data and working with his team to re-consolidate in order to measure the new metrics, Francisco was now scraping the bottom of the firm’s income barrel to make payroll.

Francisco’s first impulse was not one of panic or fear, though. It was frustration. He and his team could have avoided this much sooner before it turned into the critical issue it currently is. This was not the expectation his law firm should be meeting at this stage.

The plan was to pivot. And while Francisco and his team pivoted, opening time for new cases to funnel through and close, they optimized the machine of the firm.

For 3 months thru September 2018, momentum stalled at one point. Data remained the same based off the data Francisco examined (now based off the proper key metrics they now had visible for the entire office to see. Lesson learned: keep your entire team, including yourself,

accountable for your metrics), implying stagnancy. This thought of the Monster became more prominent. The idea to create something that would push him and his team to success.

‘This can’t be our peak,’ Francisco thought. Francisco feared stagnancy would lead to downspiral. He became more convinced the creation of a Monster would be necessary.

Back home, Francisco shared his news with Nicole. “Well, we’re still bringing home good income right?” Nicole asked. “There’s no signs of it slowing down?”

“For now,” Francisco said, “But I worry that if it doesn’t keep rising, then eventually that’s gonna plummet, right?”

“I can’t say I follow that logic. Everything eventually has its stopping point. Maybe this plateau is a good thing. It’s a resting point to re-strategize.

“I just think it can be so much more.” Creating the Monster was all Francisco could think about. He could already envisioned conquering that dark part of his mindset and being catapulted to success.

“We should be cautious, Francisco.”

“But we can’t be scared to climb higher either.”

All Francisco could think about were the numbers as he laid in bed next to Nicole. The idea that the numbers would be out of his control once again, leading to a familiar time of stress and anxiety. ‘I’m not going to let that happen,’ Francisco thought.

In order to create a Monster, Francisco decided to create a tangible goal. He set his goals on something that had been on his mind for some time now: a new house.

That morning, with Francisco running on pure adrenaline, he announced this news to Nicole. “Nicole, I’ve decided. By the end of this year, we’re going to buy a new house.”

“Wait, what?” Nicole asked, twisting her head in confusion. “Is that possible?”

“I’m going to talk with Henry today and devise a plan to make this happen. We can live in the new home, or lease it out to other people, or maybe even a vacation home by South Florida. Wouldn’t that be nice whenever we attend any *How To Manage* workshops located there?”

“If you’re set on making this happen with a proper plan, then okay. I’ll be in your corner. Just don’t sizzle out, Francisco.”

“I’ll do my best as always.” For Francisco, to sizzle out was the least likely of his outcome. Based off his adrenaline now, all he felt was a roaring inferno, ready to overcome whatever came his way with the help of his team.

Francisco explained to Henry his new goal for the firm to meet. Henry chuckled, “Jesus, you’re serious about this, huh?” he said. Henry skimmed at the current numbers outstanding and penned in numbers with his calculator based off the value of the house, the current business revenues, and any applicable outstanding expenses. Francisco did the same.

Francisco calculated his sum. “Based on the numbers I have, we would need to grow the business’ revenue by 50%.”

“That’s...that’s right,” Henry replied, “Grow by 50% in less than 4 months.”

“Okay...” Francisco nodded, internally affirming with himself that this was possible. “Let’s write out the plan, and follow through with it.”

Once Francisco and Henry laid out the plan over the course of a day, Francisco relayed the new plan for the team in person and their assigned roles to initiate the plan as soon as possible.

The initial reaction was fear. Many had expressions that ranged from agape jaws to wide-eyes stares. But as Francisco answered questions and discussed the plan further in detail, majority of his team became traded the fearful expressions with one of confidence. Many nodding in agreement with the plan.

However, there were still some that remained reserved in judgment. After announcing the plan, Francisco approached the few that remained reserved, wanting to assure them that this will be a team effort. “It’s not set up to sabotage anyone,” Francisco assured, “We are achieving a fantastic goal by the end of this year.”

The reserved members appreciated the assurance, but needed to think about the work more.

Throughout the first month of the plan’s execution, the team opened up more time for consultations, while creating email marketing campaigns to send to ideal prospects.

Thematically, Francisco wanted to test out using the holidays and new years resolutions as the subject matter. Maybe this would incline prospects to schedule despite the holiday craze.

And soon, the prospects came in. The contracts were being signed. Income was funneling through at a frantic pace. The energy within the office was at its peak. The team began tracking the number of cases per day, signing off their respective stages.

Francisco worked alongside the team's pacing. This was it. Francisco's firm was going to climb higher than ever.

By the end of the month, a member of Francisco's team quitted, turning in their immediate notice. Two days later, another member quitted, turning in a one-week notice, related to an emergency transition in their life.

For the first time, Francisco's optimistic vision began cracking. Both of his former team members' workloads would now transition to his other team. What they had already was more than enough. Now, this was going to tip the scales out of their favor.

Francisco sat down with Nicole after the news of the second team member. "Should I revert back? Jump ship before the chaos transpires?"

"Have you talked with the team about it? How do they feel?"

"I haven't checked in with them. Stressed, I imagine."

"Then you keep fucking working."

"Seriously?"

"We have plenty of time to rest when we reach our goals. And I imagine your team feels the same way. Do not give up just because things got more intense than you imagined. Just like anything else you've learned through all of this, this is where you pivot, no?"

Francisco nodded.

"Then you can do this. I know it's gonna be rough. But I'm here. I can even chip in with some help if you need it."

Francisco nodded more in approval. "Okay. I can fucking do this."

Familiar sleepless nights returned to Francisco's routine as the second month of the plan rolled through. And, in effect like one domino falling over to the next, Francisco skipped his usual exercise routine with Nicole in the morning. He began to show fatigue in his work at the office.

'Did I really sign up too much for this? Did I just dig a giant hole for my team? Is our quality dropping? I haven't even seen what the clients think.'

But Francisco re-envisioned the goal at the end of it. He looked at the emails his team members constantly kept him up to date with the ongoing tasks at hand. Comparing it to schedule, they were surprisingly on track.

He imagined the sacrifice of time each member had to endure to make this plan continue rolling. Francisco and his team were hungry. They were motivated and driven to near burn-out. They were all pushing with everything. The gears kept turning, and the exhaust continued fuming as they reached for a conclusion.

Francisco lit up with newfound adrenaline. He was not going to let this firm sink. Now, it was time to continue burning through at full capacity.

Before he knew it, the firm arrived to the end of 2018. Anxious, Francisco examined the numbers with Henry. Comparing now to what the firm was on track for initially...the firm's revenue grew by 52%. With that increase, the fear immediately vanished. He shouted in celebration, reaching the destination he forced upon himself. His team received bonuses for the achieved goal.

Francisco made it, thanks to his team and his motivation to keep moving.

Francisco took time away from the office with his family after reaching the goal. Upon returning, he examined his roadmap with Henry.

"Based on our roadmap," Henry stated, "We should be on the same consistent revenue that we're at now."

Francisco sighed. There it was again, that plateau. It dropped another seed of fear. Francisco was compelled to respond to this fear once again by doing another insane goal. "Should I be worried about that consistency?"

“It depends, Francisco. Do you have goals in the future that require a higher revenue? It’s all based on that. The firm is running smoothly. But where do you want to be?”

“Where do I want to be?” Francisco recanted Henry’s question. He looked at his current position in life. His ability to balance work with life without sacrificing anything. Being able to spend time with Nicole, and even able to be away from the office for a lengthy duration. His systems operating smoothly.

And, along with the new revenue, Francisco’s fear was lulled to a state of calmness. He didn’t need to constantly catapult the firm to new revenues. He had reached an excellent stage in his life with where he’s at now. “I guess this is okay. We’re okay.”

Henry smiled. “Great. We’re set then.”

Francisco embraced motivation to get him, his family and his firm to where it’s at today. Although he struggled with it, he learned that all lives struggle with the motivation to improve one’s well-being, from a personal lifestyle to business choices.

But, in time, if that person is searching for motivation, eventually, a spark will light into a fire. And no matter what, eventually, that person will break through walls. For him, there was no need to do that constantly.

Francisco wrapped up another virtual happy hour session with RJon and several other members, showing off the new renovations done to his backyard, slowly transforming it into his dream resort. A new pool with a miniature waterfall, pool chairs mounted on a shallow water area, and so much more planned.

Next week, Francisco would be stepping away from the office for 30 days to spend time with his family. Their itinerary consisted of a plethora of camping trails across the United States. It made Francisco ecstatic to be able to do so many outdoor activities with his family.

While the business has hit a plateau, Francisco found the right kind of momentum to continue living his best life. Traveling has become a fun custom, as Francisco aspires to travel around the world and create more unforgettable memories with his family.

Looking back now, he often wondered how things would’ve gone differently had he taken the Ph.D. route all those years ago. *The same? Different? Who knows?*

There will be challenges and trials testing one's mentality to their limit. But it's possible. It becomes even more of a reality when you know, like Francisco, you're ready to take the leap and play all-in.

Right now, there's no monster in Francisco's firm, only a machine smoothly operating the firm backed by a team of rockstars. But they, including Francisco, can feel the motivation re-igniting faster once again. The biggest lesson, as Francisco iterated, was this: "Find motivation to keep growing."

In the night, lying in bed with Nicole, with their children also in a peaceful slumber down the hall, the red digits of the adjacent alarm clock no longer taunt him. He can sleep with peace of mind and look forward to a bright morning.

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