



# Finding The Balance Between Growth And Freedom With Dan Kuschell



Growth in business can be rewarding, until it robs you of your freedom. Dan Kuschell talks about striking the balance in this episode of SuperFastBusiness.



Dan Kuschnell

**James:** James Schramko here, welcome back to SuperFastBusiness.com. This is Episode 657. We're chatting with Dan Kuschnell, who has the [Growth to Freedom show](#), and we're going to be talking about business, sale systems, connecting a few dots, helping you get unstuck, and general matters. Welcome, Dan.

**Dan:** James, it's a pleasure to be with you. Thank you.

**James:** We got connected by some mutual friends, [Matt and Joe](#). They've been on my show a few times. We've done a podcast where we shared it on their show and my show at the same time, as well. It was really well received, it was in the top 10. And any recommendation of theirs, I have to pay serious attention to because they're good people. And, you know, it's really good to connect with people out there who have got, sometimes, some similar stories, sometimes some different stories, and just to see what patterns we can recognize, what things we have in common. And also, it gives a good platform for some stimulation around ideas.

In fact, just on that topic, I read a new book that came out yesterday. I think it's called, This Is the Answer, or something like that, from my friend, Dan Norris. And I agree with about 50% of what he said, and I disagree with about 50% of what he said, but even when I disagree, I love the stimulation it causes. And I think, why does my position on that differ from the authors? And a mentor of mine taught me that a book is just one person's opinion. So when we talk about stuff here, it'd be really interesting to see what experiences we've had that are similar and what are different. And I know, for one thing, you've been in the direct response and radio industry for a very long time, certainly longer than I have. So that's one thing that's different. How much have you seen things change over the last 30 years?

## What's old is now new

**Dan:** Oh, a lot of it, what's old is new again.

**James:** Like what? What was old that's new again, in particular?



**Dan:** Well, I think people are coming back to more of like, the human being side of business versus transactions. Right? Like years ago, James, you know, when I first got started, I got started in this crazy industry back in the 80s, in direct mail, radio, TV, before the internet. And like, at that time, you could literally put out an offer, and you could generate a client and and really start the relationship. And not that you can't do that today, like, I often have been quoted in the last couple years as saying, traditional marketing is dead. Right? Because that old mindset of like, let me cast a bait and let me catch a fish today is one that'll, a) it is a wrong approach for long-term client relationship. It's very transactional, right? So we have a choice to be transactional or transformational.

## Transaction versus transformation

And the approach today is you've got to focus, if you really want to build a great long-term business. It's more of the transformational side of things. So it's the human being, it's the long-term relationship focus today that I think matters. Similar traditional selling today is dead for a lot of the similar reasons. And it's kind of like, today, the approach is more about both in marketing and selling is, you know, instead of catching a match, like, as you're listening right now, if you picture me striking a match, and there's a fireplace in front of me and I throw this match into the fireplace to try to catch the log on fire, you know, one out of 1000 will catch fire. Or, a smarter, better long-term approach to that is, let me get this piece of paper, let me light that on fire and get a nice little flame going. Okay, let me set it down. Let me put some kindling on top of it and add some more warmth and value there. Okay, I got kindling going, now let me take some small branches and put it on top. And now let me go ahead and put the log on top. Well, if you build that heat, build that value the right way, building kindling, now you can have a fire that will burn for days and days and days or translate that to now, business. Now you've got a long-term transformational relationship.

And, you know, I think when people hear this idea, sometimes for the very first time, it clicks for them to understand, okay, how do I go out there and really build this long-term vision? The other part is, is I think people have been misled, James, on like, what is selling, and what is marketing? Right? And I'm sure you see versions of that, too. But that's another big distraction, is people have this misunderstanding of like, what really is sales, what really is marketing in the first place, and they confuse them, and or they just have misconceptions. So those are a few.

**James:** You're really touching my sweet spots here. So on that fire analogy, you know, what I'm saying is, old-school marketers are what I would classify as one-trick ponies. They know one trick: it's find out what people buy, and then sell it to them. They've simply taken the direct response marketing tactics, and then they've bludgeoned social media with it these days.

**Dan:** Yep.

**James:** There's a couple of people out there who are just producing a constant stream of social media diarrhea of direct response sales videos with branded calls to action at the very beginning of every single piece of content, and they're just in your face and in your Messenger and in your email, multiple times a day. And I would say the analogy there is they've tipped gasoline onto the fire starter, and they've got this huge flame. And then they say, Hey, everyone, look at this amazing flame, it works. And then they sell that process. I just think, where's that going to be in two or three years from now after they've burnt all of the gasoline up, and there's no logs happening? And I think they're going to get cold.

**Dan:** Yeah, I agree. And I think it will resemble, you know, like, if you think about forests, right? You know, the forest fires that come through, and like, it's just completely gutted. And it's desolate. And, you know, we see the sparklers in business, they come and go. You light a sparkler up, and they glow for like, a couple of minutes, and then they kind of fade away. And there's a lot of examples.

And I think coming back to your direct question too is, you know, if you look at what's more important in business today, and at any time, I mean, this is why what's old is new again, is this idea. The great ones of the past understood this better, as well or better than anybody. And the better people understand this piece, I think, and I didn't invent any of this, by the way, it's just going through experience, you know, some failures along the way, having built 11 companies, a couple I had to bury in my backyard, James. So I get grounded and get perspective.

## What really lasts

But if we had to pick between what's more important – tactics, principles, strategy or psychology? Right? A lot of people are selling I think what you just described James, which is tactics. Let's go find that one trick, that magic button, that magic pill, that magic one liner that's going to convert, right? Go a little bit higher, people go to strategy or principles, and hey, that's better than tactic for the long term. But what's even better and more proven to last over time is the psychology. Right?



And again, the human being psychology things, you know, Tony Robbins talks about it in terms of his six human needs. Brendan Burchard has a version. Maslow's hierarchy of needs is when, you know, that old adage, find a need and fill it. In many ways, it couldn't be more wrong for most business owners. It's not find a need and fill it. There's a lot of people with great ideas that filled a need, but they're broke because they didn't fill a want. They didn't feel that hungry desire for somebody. And the six human needs, for example, are certainty, uncertainty, love connection, growth, contribution, and significance, in no particular order. At the highest level, growth and contribution are the highest level. In Tony's version, Tony Robbins' version, that you can serve.

And like, how many people, James, do you and I know that they confuse this whole... like Gary Halbert, who's a legend in direct response marketing over the years, he says, you know, there's no correlation between being good and getting paid. Right? What's the difference between, like, a \$1 bill and \$100 bill? If you put them up next to each other, on top of each other, they're both the same exact weight or the same exact size, the same exact color. The only difference between the two, in the value, is the message, right? So when we get great with our message, great with the psychology, we can go out and ask for 100 times or create 100 times more value out there. And I think that's a big part of what can separate all types of businesses, the little guy, even, from the big conglomerates, if they really get tuned in on this. So it's a deep conversation, but it's something I love to talk about.

**James:** Yeah, I saw a friend of mine, Brian Casingena, (I'm not sure how you pronounce it) talking about that same thing. Except he would argue that people who want a Ferrari or want to have a \$10 million business, for them, that's a need. So he said you should market to needs. You just have to find the people who need to have that Ferrari; they're going to have a much stronger desire than someone who just wants a Ferrari. It's an interesting angle on it. **Dan:** Yeah. And the deeper level of it is, is that you find somebody that wants what they want. And the reason they want it isn't what they think. That's the other key, is there's layers of the want and desire. And when you can really tap into the emotional desire, you find out that the emotional need is what they want, that connects that thing. Right? And not to get too deep on it, but that's, on one end, I would agree with that, when you connect the emotional need with that deep desire of what they want.

**James:** Yeah, I think that's true. And I've talked about this before, a lot of people out there are pursuing things, not even actively pursuing something they ever even consciously thought about. They're driven to prove something to their dad who harassed them as a kid, or their teacher who told them they're going to be a dummy, and those sort of things. That's pretty deep stuff that causes the drive.

## Just what is sales?

While we're touching on that, you did allude to people having different versions of understanding of what sales is. I'm curious what you think sales is. Well, how would you define it?

**Dan:** So, you know, sales, there's a couple of versions that I've come to really enjoy. One of my first coaches, James, first teachers, his name was Tom Hopkins; he said, selling is helping people. Right? Simple for people to get. The more people you help, the better you're doing. Another one that I love today, that's kind of a hybrid of that, is selling is serving. So if you show up as a servant leader, you're selling, and serving at the same time.

Another version is Dan Sullivan, who runs a great company called Strategic Coach. I love this full definition; it's kind of deep, but I'll share it. He says selling is getting someone intellectually engaged in a future result that's good for them, so they can emotionally commit to take action to achieve that result. So selling is getting someone intellectually engaged in a future result, a bigger picture, bigger vision, that is good for them, so that they can emotionally connect to that to ultimately take action to achieve that result.



You know, another simple version of selling is influence. Right? For me, those are the healthiest of definitions that I think support sales in a good way. And you know, when we believe in what we're selling, and you know as well as anybody, I mean, with 600 shows that you've done, all the incredible resources you make available, this event you just came from, you and I, we have a moral obligation. When we believe in what we offer, we have a moral obligation to share the value of it. Right? And we'd be doing a disservice, we're not a servant leader, if we don't share all the value that we can. We're not helping as many people as we can, if we're not sharing it. And we're certainly not giving people the ability to experience a way to get their bigger future that's good for them if we're not sharing it. So I think it ties in, you know, really, really well.

**James:** It's funny how I reject the idea of being a servant, but I'm okay to help people, even if they're probably the same thing. I find the word "servant" almost offensive, I think it's got too much religious connotation for my liking. But also, I think of someone in chains and shackles, you know, or waiting on a master who's barking orders at them. So that's probably why I have a problem with that word. I don't mind the helping thing.

The sales definition that I've used as a foundation fits with most of the versions you've talked about. In fact, Dan Sullivan's is like an over extended version of this more or less. I like the one from Neil Rackham from SPIN Selling, that sales is just the process of change from the current situation to a better alternative situation.

And the whole frame that I put it in is, if I'm selling something, the person has to be better off, it helps if they can see their current situation, which you know, that involves things like investigation and asking questions and understanding them and knowing them. So all good copywriters talk about the research phase. It's the boring part, but the best part. And then there's the being better off - if they can see they'd be better off, often the sale happen by themselves. So if you're doing that well, the sale will almost happen automatically, and you'll never have to know 27 tricky, Tom Hopkins tie-downs, tag-ons, and my favorite offensive sales term is closing. Anyone who talks about closing is either doing that because that's what their market needs to hear to understand what it is that they're talking about, or they just don't know.

But closing is like, that's the last part. In the SPIN Selling methodology, he talks about obtaining commitment, that's how they close. It's what's the next step. And often, and this is really important. And from all my years selling, sometimes the next step can't be a purchase, it's too early to make that call for a purchase. And if you do that, and you're forceful, the customer may not actually be better off. They might not be in a position where that's the best thing for them. And they might need another step or an intermediary step in between.

So example, if I was helping someone find the right car for themselves in the Mercedes-Benz showroom, sometimes the next step might be to take the car to their house and to let their partner drive the car on the normal route they would use to do the school pickup, and to see if they feel comfortable with that, and if that's going to be better than what they're using right now to do that. And that would often be a more powerful step, than to try and ask for the order from the person who's not the primary driver, who's not there right now. You know, it's like the classic Roll-A-Door technique, they will not go to your house unless all the decision makers are there at that appointment.

## From closing to enrollment

**Dan:** Yeah, I love that framework and if you're listening right now, there's just so much wisdom that, James, you're sharing. And, you know, we look at that, like, we have shifted the conversation from closing to enrollment, right? Because enrollment leaves that door open for follow-up, it leaves the door open. Similarly, we feel strongly in the idea that you want to always leave people better than before they met you, even if it's not with you. Get them connected to the right thing that's good for them. And so, your approach, I mean, it's no wonder why you're having the impact that you are.

**James:** Oh, thank you. I like the idea of enrollment. I think [Dean Jackson](#) would call that someone raising their hand. So, identifying themselves as someone interested in what you have. And I put a lot of work into creating the environment where people can see where they're at, and how they would be better off, and they can join the dots themselves. It's far more powerful from a persuasion perspective if someone can join the dots and create the drawing as if they drew it, than if you draw it for them holding their pen. You know, say, "Look what you drew." They're like, "Hey, but I wasn't even... you were moving the pen." Like, they don't have any investment in that. They're not feeling like it was any of their responsibility. They feel pressured and icky.

So that was a good discussion. That's an old that's new. Frankly, I never understood how it got so far off track anyway. And it's a classic that you mentioned, humans, because that was really the theme of my event last week, where we met in person, where the quality of the people made the event what it was. One of the presenters, [Angela Henderson, who's actually presented a podcast on the topic of human to human marketing](#), broached that subject at the event. It was a real success – it was in the top few presentations.

And then we heard from [Mike Rhodes, talking about machine learning and AI](#). And the moral of his story was, we're going into a phase where we'll just be extra human; we're still humans, enhanced by machines, not replaced by machines. So that's where I get concerned, when I see people delegate their whole business off to automated evergreen webinars with the [chat bot](#) sequences. And everything other than a human interaction can be quite dangerous, I think, as a path to follow, because people will crave being looked after and cared about and having that personal connection. And if you can supply that, which is something I do in [my coaching business](#), (and I specifically want to ask you how you sold your coaching business, because that's going to be a really interesting discussion) that's something I supply that no one else can offer. There's no one else in the world can be me helping that customer as a human. So that's a good cash flow model; it's a good position to be in from a competitive point of view.

## Why sell a business?

So it kind of leads me into our next topic. Coaching business, you built up a big coaching business and then sold that coaching business. Can you tell me more about that?

**Dan:** Yeah, I mean, it happened out of necessity. I had a vision that we were going to transform small business and help small business owners be able to become champions in their own way. And over the course of a handful of years, we had over 250,000 clients take advantage of a lot of different educational resources we made available under a few different brands and experts. I think the first thing is I got myself out of the way, James. And, by the way, made a ton of mistakes. I mean, it started out of like, a bedroom in my home. And then I brought in one person, and then that grew into a small little office, like a 400-square-foot office with four people. And then it grew to like, 40. And then it grew to 175 employees and a couple of offices and outsourced staff. And we were generating at our peak over 2000 clients a week with our education programs, and then it fed into our coaching model.

It was about delivering the end experience, the end value, the transformation, the breakthrough. So if I had to say, like, what were a couple critical key pieces is, like you do so well, from my observation of reviewing some of the work that you do and how you bring value in the market. It's not about us, it's not about our product or our service. It's, what is the problem you solve, and getting just real clarity on that simple thing. What is the problem you solve? Ideally, how do you do it differently and uniquely to anybody else, that someone can't get it the way you'd package it and deliver it anywhere else? And then, what is that solution? Right?

And so we had a suite of all kinds of different resources and tools. And the thing that we had realized, I think, was getting like, I didn't want to build a guru business. It's just not my style. And so I built other gurus inside of our platform, way before others were doing this. This was when I sold the company, it was about 12 years ago now. And we had built a series of experts within our platform, and we championed them, edified them.

The thing that became the most value to our strategic buyers, we found later, was this massive community we built. This list that we built, it was our number one asset. Our clients, which were over 200,000, and our subscribers, which actually grew to a couple of million subscribers. And we had a system of follow-up, and we had a system of generating clients and acquisition.

## A powerful game changer

And the way I view it is a lot of people are too lazy and too cheap to build a real business. And what I mean by that is, we were able to generate a lot of leads and sales online, and there's a lot of people generating sales online today. Well, what if you could have one thing that could be a game changer that can grow your revenue and profitability exponentially, many times, four to 10 times, with one simple thing? And I realized today how valuable that was, and I'm just going to share with you. Having people who buy online, and then transferring that to a connection on a phone call – that one little thing, if you do it right, will help you increase your revenue and your profitability four to 10 times, because so many companies – when's the last time, as you're listening right now, that when you made an order online for any kind of program, product, service, that you got a phone call from that company saying, Congratulations, you made a great decision? It's few and far between, if any.

So if you do that one thing, just a follow-up call to say, Congratulations, you made a great decision, with a voice on the other end of that phone line, you automatically are ahead of your competition. Separate that if you actually call them to follow up, and Hey, what was the reason you got started? What's the biggest problem you're looking to solve? And then you actually, intentionally, you don't have to sell; you just serve by helping make them aware of other things you have available. You can offer a suite of things because you connected with them to truly find out, where are they at? What are their problems? And if you have the solution for it, you make an offer, they'll actually take you up on it. And then if you just do that regularly in a sequential follow-up style every couple of weeks to a month or so of serving to help them solve their problem, you'd be amazed at the results.

And so what we found is, our system and the community and the client base that we had built was of immense value. So creating systems around that, creating that connection factor, pays huge dividends. There's a whole lot more, but that would be a couple of really critical things that almost anybody could apply that's in digital marketing right now that would help grow their business.

**James:** Yeah, a couple of things on that, and actually the [prior podcast to this](#) had very similar advice, figure out what you can uniquely provide that no one else can provide, and then provide the pathway to get that.

I like what you said about the phone. Mixing marketing mediums is a really good technique. I always send out physical things when people purchase certain stuff. The phone is great. I remember this famous video of Gary Halbert at a conference saying that if you could just give online marketers one piece of advice, it would be remove the purchase button off your website and go to the phone call, because you'll immediately increase your conversions, as your conversions for a phone call be much higher than a web page. In fact, that's how people come through [SilverCircle](#). They can't purchase that off the side; it goes through basically to a phone call, and that's when you can have high personalization as well and make sure you're only ever dealing with the right customers.

## When it's not what you expected...

With that business, I'm interested as you went through that journey from bedroom through to 175 people in an office there. It was serving the clients. Did it ever get to a point where it stopped serving you and became a bit of a devil or a Frankenstein you'd created, the way you're like, hang on, this isn't what I imagined it would be? Because I see this happen a fair bit.

**Dan:** Yeah, I could give you some BS answer and say, Oh, it was perfect. No. It actually, it outgrew what I really wanted. And so the short version is, I built up this business from the outside and people looking at it would go, My gosh, this is awesome. And it was, in a lot of different ways, except it wasn't what I wanted.

And what ended up happening, I mean, I found myself like a lot of entrepreneurs, James, where I was so committed and obsessed with the business. I know there's very few opportunities even today that I don't love. Right? Shiny object syndrome? And you know, through discipline, I've learned to say no a lot more, almost nine out of 10 times now compared to then.

And I was working close to a hundred hours a week, and I'd just had a couple of kids. And I remember, a couple weeks after my son was born, I woke up with chest tightness. I ended up, as you're listening right now, imagine: like, you built this great company, you got 175 employees, things are going pretty solid, pretty well, good profit margin. And you have your daughter who's two, you have a son that was just born a few weeks prior, and you wake up with chest tightness. You call your doctor, he says go to the hospital. I go to the hospital, and then they do some basic test, and then all hell breaks loose. They put you on a gurney, they get you into a room, it's 911, all craziness going on. They're putting diodes all over you. And then you're in this hospital for four days, they do a heart procedure on your heart, you have to sign a disclaimer, it says you have a one-in-X chance of dying in this procedure. What would that do to your state? Like, for me, it freaked me out, and it got me to reevaluate everything very fast. And you know, I believe God has a way of like, tapping us on the shoulder to see if we're paying attention. And then if we don't pay attention, which probably was the case for me, He'll get a two by four, hit you. I didn't pay attention to that, and then you get a telephone pole and rack you upside. And that's kind of probably what happened for me.

What I realized is I had burnt out. Like, just completely focused, obsessed. And you know, essentially, I have addictive traits and addictive behavior, addicted to this building, this, what I thought was my dream. In that hospital room, it really got me. I remember balling up almost like a baby after I had to sign the disclaimer to do the surgery the next day, James. And I wrote what I thought was going to be an addition into my will, right? For my family, my kids and this stuff. And I'm bawling and crying and sobbing, writing out these last things to make sure if something happened in that surgery.

And then I came through this process, it's a process called DABDA from a book called On Death and Dying, Kubler-Ross. And I'm sure I went through all of those stages from you know, denial to anger, to bargaining, to depression, to anxiety, and then you come to a response. And it was like, okay, God, when I come out of this, I'm going to be different, what am I going to do different?

## Some life-changing questions

And one of the things that I've always believed in, investing in myself. And I've been an investor in a high-level coaching for a lot of years consistently, in coaching. I probably invested over a million dollars now, in coaching and training. If I come out of this, I'm going to find a coach to get me re-grounded again. And this coach, her name is Dr. Cristy Lopez; we're still friends today. She walked me through a product that wasn't completely new to me, not like I hadn't heard this before, but she got me to really focus on it. Plus, when you're in crisis mode, you have a tendency to pay attention more. It's like that old adage, you know, people will pay attention when they pay; or when you pay, you pay attention. And I felt like I was in crisis pay attention mode. So I hired Cristy.

The trick that I use today to make every decision, James, that really, I mean, I think saved my life, is really what it did. If you could picture, you can see me, James, so you see this. But in my worst state healthwise, I was about 246 pounds. Right now I weigh about 157, 155, right? I hover in that range. Like how did I dramatically shift? Now, first of all, I went from this obsessed – I'm still a workaholic, but I put guard rails on now, and I have discipline. And I know how my wife helps me, and I'm not perfect at it, I still, I can get crazy on this stuff. Because when you're building your dream, we all know, if you're a part of James's community, you know what I'm talking about. You know what you want to do and how you want to impact the world. But you can have it both ways. You can have a great life and you can have a great business. This whole idea of going out there and frickin' hustle and work, you can sleep when you're dead, is total bullsh\*t. And I didn't understand that until I went through this process. So Cristy, James, got me to think of three questions. Number one, what do I want? Not, what did my hundred and 75 employees want? Not, what did my wife want? Not, what did my kids want? I realized that I had let go of my personal values to try to make everybody frickin' happy.

And you know that old adage, I think they call it, "The tail wags the dog." See, as you're listening, are you letting the tail wag the dog? Are you letting your customers wag the dog? Are you letting your family wag the dog? Friends, their opinions, their thoughts, your team, your staff? Or are you making it based on what you want? So number one question, What do you want? What do I want?

Number two is, Who are you? Not the labels, not the titles, not the human stuff, like all these accomplishments that we can all you know, dress up on our resume and on our business cards and our website. But the human being – coming back to that human factor that we've started this with, right? Who are you at the core as a human being?

And then number three are your core values. You know, they talk about great companies have great core values. Well, when's the last time you sat down and personally evaluated your own personal values that you live by, as well as your family? Isn't it important to have great family and personal values that tie in with the corporate values? People go through and spend days and lots of money to do corporate values, but then sometimes we let our personal life kind of go by the wayside. So she got me to think Well, what do you stand for? In other words, the values?

And I have to tell you, James, and I'll save the longer story on this, but the first time, she had me do question one, because she didn't do all three in one sitting. She had me do these questions one by one. First time I did each of these questions, I literally sat there in a chair, writing like, one little gibberish answer, and was freaking stuck. I was stuck and just kind of awkward and just feeling like, holy sh\*t. Like, I'm in my, at the time I was in my early 30s, and I'm like, keep in mind, I'd spent probably at that time, almost a million dollars at that time in personal development. So it wasn't like I hadn't been exposed to this stuff. But I was sitting there stuck in this mode.

And it took me a few weeks to come up with some good answers for number one of what did I want, and get selfish about it and be selfish to be selfless to others. You know, a drowning person can't save a drowning person. You know, if you're in an airplane and the plane's going down, they say put the oxygen mask on you first. You know, we can't love someone else till we love ourselves. You can't help someone truly get what they want if you aren't getting what you want. I didn't understand the core of that truly until I went through this experience.

All long in the short, these three questions allow me to filter decisions, James, today, to make better choices, better decisions. What to say no to, what to say yes to, being on your show to help contribute to the incredible community you've built. You know, when I'm matched up, does it fit this? Boom, it's an easy yes.

## Finally getting clarity

Anyway, there's a lot more to it, but ideally, that gives some perspective on it. And if you're listening right now, if you're looking for a way to get true clarity, certainty, confidence in what you're doing, and then where you want to end up, for me, what kind of brings this all together, when I finally got that clarity, because you know what, although this sounds great, and it is great, in so many different ways, it's not what I want. So I sold the company, had a great exit; I was very fortunate, very blessed. Then I was able to take some time. I worked on my health, I went from 240 something now down to like this, you know, great, fit. I was able to be a dad, I was able to spend time with my kids. And now I've come back full circle, and I'm working with some amazing clients and helping them grow their businesses exponentially, showing them how to create these sales and marketing systems, instead of being broken, disjointed, fragmented, bringing those sales and marketing systems together to grow and to allow them to focus on the things that are most to them. And it brings a lot of joy, being able to do that and help some great influencers and experts out in the world, as you know, James, doing what you do.

**James:** Yeah. I can see why Matt and Joe introduced us. We're on the same page here. I mean, I'm sorry that you had to go through the near-death experience to get there. I didn't push things quite that far. But I remember sitting in my house one day, thinking, I just don't feel happy. And I wrote up on the whiteboard all the things that I'm not happy about, and I systematically crossed them out. And it meant some big changes. But I sold off two of my business units; I moved to the beach; I've basically just changed, and am a very different person now than the 10-years-ago me.



So I like this concept, those ones I sort of thought that I had. I put it in my event and I shared it on a recap of the event recently. And that is that it's good to do things now that will set the future you up to have a better life. And that's really the point of this podcast, if you can listen to this. Maybe you don't have to build a huge business and go through the same experience. Maybe just take Dan's word for it. And take my word for it that it's a really common trap. People start out well-intentioned, they get excited, they have entrepreneurial tendencies. They keep growing and some people get into a pissing contest, let's face it. I've seen lots of little pockets of gurus. One guy who I know was just totally taken by that whole peer group thing of ego. Lately, I've seen him shift and start to focus a little more on family.

There was one thing that did it for me. He once shared a screenshot for me of his schedule, and every single hour of every day was blocked. And get this - he showed it to me to impress me. And I'm like, dude, you got a major problem here. And then I saw his little kid's name and soccer on one of the things and he had a webinar blocked across it. And I just, I actually welled up a little bit. I felt sad for that kid. And having the experience, both being the working-seven-days-a-week phase, and working from home now, raising a kid again, the difference is unbelievable. I think that it's so good if you can experience it. And my message is certainly that you can, and you're proving that as well. What a dramatic transformation. You look quite skinny to me on the camera that I'm looking at.

**Dan:** Yeah.

**James:** I want to close out with one different topic. You mentioned you work with celebrities, influencers and famous people, and I certainly do as well. I'm wondering, if we compare notes on this one, how do you find, when you're dealing with someone with a really big ego, how does that relationship go? Because firstly, that will usually prevent them from seeking help. Secondly, if they do, they most definitely want to keep a tight lid on it and almost keep it a secret and not share the secret sauce, their secret weapon Dan, or in my case, James, the secret weapon. A lot of them want to just keep that hush, hush. So you can't really use the testimonial in some cases. So I was just wondering, you know, your thoughts around this particular topic? I know you've probably been there.

**Dan:** Oh, yeah. I don't know that I have had the perfect answer, James. What I can share is just the experience, which is how I prefer to do it. You know, I'm not a big theorist, I just share the experiences of what's worked and what hasn't. And some of the cases, I've been able to use the testimonials. I've also experienced the case where they definitely don't want me to really share the experience, as well. And then, you know, some people just don't like sharing the stage with anybody else. That's their approach. And I think if I had to pinpoint now what I attempted to learn from that, is, work with clients where the values are in alignment, right? And you don't always know that, because what people say are their values are also sometimes different than after a certain period of time.

And I hope this doesn't come across cold or callous, but I personally have discovered that, you know, we all have seasons. And so, whether I'm working with someone in a short season, or I have the good fortune to work with someone for a long season, is, just make the most of that season to leave them better than before I met them. It's the greatest honor for me, my kids, my family, that I can provide. So, leveraging those celebrity experts' stories, obviously I would love to use a few more that I can't really use because of the agreements that are in place. And certainly, being a person who loves to help champion people and build people, at the end of the day too, hey, I'd love to get the acknowledgement for helping do a good job for somebody and help them get a breakthrough and help them get a transformation. But some people are just, you know, they hold their cards to their vest.

So that's the best thing I can share is, early in my career, I really made my choices of who I worked with, mostly on the financial opportunity. And today, and I think I learned this from two guys, Joe Polish and Dan Sullivan, and Dan Sullivan's model really strikes me the most, Joe just talks about it a lot. And, you know, he's done a good job in his own world adopting this framework, but Dan Sullivan calls it his opportunity filter of how you make decisions on opportunities. I kind of moved it towards, how do you make decisions on working with people, and there's five categories.

## Dan Sullivan's client filter

So in the beginning of my early days, I'd evaluate the opportunity, okay, I'm going to say yes to this because oh, we can do this together, like financially. Now, the financial is the least important of that piece. But it is a piece. I don't just completely go, money is not important, because that's total BS too. You know, it's a factor.

But there's four other criteria and filters to it. And he calls that up, enhance. So when we come together, do we enhance each other?

Second category is appreciate – do we appreciate each other both in gratitude for what we do, but also do we appreciate each other in what we're doing? Because there can be a season where you work together, whether it's short, or for a long period, but then you start to outgrow one or the other, or both mutually outgrow each other. And that's kind of normal in life, in business and relationships.

So enhance, appreciate, would we utilize each other? Like, would we eat each other's dog food? Right? Most of the clients I've worked with and or do work with currently, I would buy and or have bought their stuff, and do buy their stuff, because I believe and vice versa, that they're a client of ours. So utilize.

Then, refer. Is it easy to refer without any, like, financial incentive? I've got numerous clients that I constantly refer and advocate for, and have zero financial interest in that relationship. And the clients I choose to work with today, James, I have to feel like I could refer them without any financial reward as a value.

And then the fifth is, what is the financial reward? Like, our criteria today in working with our private clients, you know, we have to work with someone that's got that exponential mindset where they truly have a foundation, they're already usually at a million dollars or more in revenue, and they want to add another 10 million in impact to their business. That ends up being a good fit. Because, you know, that isn't going to happen in like 60 days. Like, I'm not a magic button for somebody's desperation, ploy or tactic or whatever. But for someone that really wants to go to that next level, which is, you know, typically going to be in about, depending on where they're at, 12, 18, 24-month focus, we've been able to help a lot of different experts grow exponentially with that kind of focus.

So those five values today. So when I make a decision, and also I've made mistakes at this, I've done it wrong. I've worked with somebody, and then I've had to come into client work even in the last year, where we worked with them for 90 days, and I realized they didn't fit the values and we had to fire the client. I remember a few years back, there was a big expert, everybody would know the name, probably, in the US. Like, a very prominent direct response marketer came to us, offered us 100 grand up front, and then some royalties. And when we really got under the hood to see what they were doing, some of the, we'll call it the carnage, they had left it behind with some of their clients, we turned it down.

And, you know, having a filter process, whether it's this process, or coming up with the criteria, like what I loved you shared about your whiteboard, it's like, what am I not happy about? You know, a good exercise to do is, what are my most fun clients that I've got? What are their qualities and characteristics, and what are clients I've just had like, a bad experience with, what are some of those characteristics? And then come up with your value framework. Dan's model, the opportunity filter – appreciate, enhance, utilize, refer and then the financial reward – has served us well to be able to make a better decision more often. And so I would say those are a couple of critical things. And then, deep down, here's what I also know, because success is an inside-out game. If I can't use XYZ's testimonial, even though we did a great job, I know deep down in here from the inside out, we left them in a better place than before they met us, and I think at the end of the day that's representative of being just a great leader.

**James:** Yeah, I found in some cases, when I've done a good job, the people around them notice that so much, they probe until they find out. Like, I'm just happy to do good work. I agree. We have to think, maybe it's just our own ego if we want to use it so much. I've become known for not standing on the heads of my customers to champion it. But it is a very common conversion principle, is to use celebrity in marketing, and it's a, I guess, a more conservative approach. It's a role I'm happy to play.

And I'm so glad we got to meet and chat, Dan. You've got a couple of websites – you've got [Growth to Freedom show](#), and you have [Breakthrough3x.com](#), where people can find out more about you.

I wanted to say thanks for putting aside the time, and it's been a pleasure getting to know you, and I'm sure we could talk for another 10 episodes on a number of topics. So if we do get comments around this episode at Episode 657 on [SuperFastBusiness.com](#), let us know if there's something you'd like to talk about again, because I'm all for a repeat episode if Dan is, as well.

**Dan:** Absolutely. Count me in for that, James. I love the community you've built. I love your vibe you come from, and I'd love to help anyway I can, and it'd be an honor. So thank you.

**James:** Thank you.



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