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You know, you should get your money back in spades and have the volume come in. Then you can think about maybe delegating the VA. So it's really, it's, it's really something to think about which way you're gonna go first.

Nancy: Hi, and welcome to Your Permission Prescription, the podcast that shows you how to confidently say yes to you and consciously create the life you desire. Hopefully you've heard the big news by now. My next book is coming out on September 6th. It's called *The Art of Change: a guided journal, eight weeks to making a meaningful shift in your life*.

Now, this is so much more than just a journal. This guided journal is based on a powerful process I developed and it's proven to help people make big, meaningful changes in their lives that actually stick. *The Art of Change* is the next best thing to having me buy your side, providing you with tools and prompts to bring about the changes you want in your life.

And to celebrate the release of my sixth book. I've got a gift for you for a limited time. Everyone who orders, *The Art of Change* will be able to claim a very special bonus. I recorded an audio program called *Eight Dimensions of Reinventing Yourself*. This audio is the perfect companion to *The Art of Change*, and we'll go on sale soon after the book is released.

But for now, we are offering it for free to everyone who orders my book in *Eight Dimensions of Reinventing Yourself*. You'll receive specific teachings on the concepts of reinvention to contemplate. You'll be guided through explorations of discovery so you can take action and you can keep me in your ears, just like you do when listening to my podcast.

You can learn more about The Art of Change and how to claim your bonus at Nancylevin.com/journal. Now let's get into today's episode.

Welcome back to another episode of Your Permission Prescription. I'm super excited today for our guest. I'm going to introduce you to Karen Sergeant. She's a team growth strategist and advisory COO. She helps business owners survive their growth spurt, grow their teams and build a strong culture based on consent and accountability.

Her mission is to empower CEOs with the operational confidence to lead their team and grow their business. She's based in Tucson and works with clients around the world.

Nancy: Hi, Karen.

Karen: I'm so happy to be here, Nancy. Thank you.

Nancy: Yay. And for anyone who happened to listen to the year anniversary episode that I did with my COO, Kylie, Karen is the coach we mentioned working with. We were so fortunate, right?

As I brought Kylie in, as my integrator, Karen worked with the two of us for a couple of months and it changed everything. And we still refer back to our time with you Karen today.

Karen: That is so thrilling to hear. Yeah, that was, that was a good fall. I enjoyed that.

Nancy: Yes. So, you know, I will also really credit you for having me step into the role of CEO.

You know, I had, at that point, really been thinking of myself as an author or a coach, or, you know, even if I already had my training program, but it was really new to look at myself as the CEO of my business. And when we did work with you, we were working in a framework around how to not be the bottleneck in our own business.

And from that came my motto I will only do what only I can do. And I'm proud to say that that has stuck.

Karen: That is that's so fun. And you know, that moment, that corner that you turn when you are. You know, you're a solo and then you're a solo plus, and then it gets big enough and you actually do have to turn a corner if you wanna continue to grow.

You do have to stop doing some things and start being the CEO, or you can decide not to, but you, but it is a sea change across so many fronts. It's really not simply just go get more head count. There's behaviors, there's mindsets. And I was so curious, like what for you, what do you think you were bumping up against?

Before you turned that corner, what was it that you finally turned and stepped into CEO?

Nancy: Yeah, I think, as much as I hate to admit it, I think I was still a bit afraid to let go. I wanted to control everything. I wanted to have my hands and eyes on everything. I thought that I had to do everything, you know, so there were a lot of beliefs involved.

There was a, there was a big mindset shift and it really, all of it became possible because I did find someone in Kylie who I really trusted to handle the things that had been living only in my head.

Karen: And I remember Kylie saying something like it's, it's like a couple, you know, a couple realizing what each other's love languages are and being able to speak it.

So, so part of what you're saying is it felt unsafe to delegate down because not only were there not necessarily going to do it exactly the way you had it in your brain. But maybe they weren't even going to come close and you would need to get in there and rework, and that's not fun for anybody either.

So there is a skill set, like it's not just mindset and it's not just like thinking the thing, thinking the right things. You do need some actual skills and some templates and some learning to get the stuff out of your head and organized for your team to go execute on. And that was kind of the moment that I was able to show up in and, and give you both those tools.

Nancy: Exactly. Because even when I delegated something or it was someone else's responsibility to get it done, I was still holding it. And the big shift came when I realized, oh, I can actually give this to someone else to hold so that I have space and capacity for creativity, for doing new things.

And part of it, what I realized like a big shift I recognized was that before I would just sort of squeeze things into my day, like squeeze in a video that I had to make or squeeze in a podcast, or squeeze in something I needed to write. And then what happened? All of those things, the content creation became my own tasks.

I didn't have to squeeze them in. They were, what I was really doing instead of actually all the other stuff. It was great.

Karen: Oh, that's tremendous.

Nancy: Yeah. You have a really interesting background. So I have to, I first have to ask you to share it because I find it fascinating.

Karen: Yes, well so I'm kind of in like the third chapter of my career arc. My first was out of college. I was in Silicon Valley during the Dot Com boom in the nineties. And I was working for a software company. Everyone in Silicon Valley worked for a software company. And what was really great about that is there were some really superstar managers and directors that I had access to the, just the B school graduate or not B school, business school graduates. And they just tremendous knowledge transfer and I learned a lot, and then I ditched everything and moved to the beltway and I worked for the government in counter terrorism.

And that unfortunately was also sort of a boom.

Nancy: Yeah.

Karen: Because I was on the bin Laden desk about just a few months before the September 11th happened. And then I kind of stepped onto this accelerator, this gas pedal that took me through the next, pretty much decade, working counter terrorism out in the field in Afghanistan and Pakistan.

And then back in headquarters. And so both were these growth periods and they were both kind of the wild, wild west. So lots of changing shifting priorities, shifting budgets, uncertainties, like my, my ability to, to motivate people and to lead a project through uncertain times and high risk situations were really kind of where I made my bones.

And then I burnt out. So completely badly that I had to, I had to leave. That was my first love for the counter terrorism and I had to quit my job, sell my house. I moved to the ocean and just licked my wounds for a couple years. Just trying to get everything back and regulated.

And then I was like, well, what do I, what can I do? And I was trying to think of these transfer. Like you can't do counter terrorism from the beach, unfortunately. So you have to think of another career move. And so I thought about the fact that I did lead teams and people and projects, and that was the kind of transferable skills that I figured I could go and sell on the gig economy. And here I am.

Nancy: When you said that you really thrived working with people in uncertain times and sort of instability. I mean, hello, here we are. Yes, I know. Right.

Karen: All we have to do is wait and it comes around again. Doesn't it? I think one of my talents, it's just like kind of a funny thing, but one of my talents is keeping the main thing, the main thing.

I have very I have a very good focus when it comes to that. and I swear that both in my, my two other jobs and, and when I coach my clients, I feel like I'm saying no a lot. I'm just saying refocus, refocus, or we can change our minds. Like there's nothing wrong with changing our minds, but we have to be intentional.

Like we did say that these were the priorities and so much about. Scaling a business, not necessarily the startup phase, but the scaling phase is, is saying no to a lot of distractions and focusing and doubling down on what's working. And so I feel like, I don't know, I've been in training for 30 years to provide that. It seems to be, it seems to be the key that unlocks the scalable growth.

Nancy: I mean, I see that completely true. And you know, something that I also really learned working with you is. What got me here isn't going to take me there, you know, and I look back now at really a business that I started with duct tape and throwing spaghetti against a wall. That it really now is a full-fledged operating true business.

Karen: And how do you feel about that? Because I feel like in some ways it's a little bit unfair that all of the talent and the things that you learned in your scrappy startup phase, truly aren't, what's required. Especially as the founder slash CEO. Once you turn that corner, I call those the MacGyver habits.

Nancy: Totally.

You know how you were, MacGyvering everything you were 11th hour, you were Jerry rigging, scotch tape, duct tape, whatever that is not something to scale on, but that is how you got to the point where you're looking at turning the corner and scaling, but you do have to throw it all out and do something different.

And I'm just wondering, how does that feel in, in your seat when you have to confront that?

Nancy: Yeah. I mean, for me, I also look at it very much through the lens of 20 years of being an event producer, which is very much being a firefighter, and there's a lot of MacGyvering all day long and it was all I knew.

It was really the only way I knew to do anything was to just be in that like high alert, full on mode. And so, part of the process of me, delegating and trusting and leaning on others was really the decision that I ultimately made that just because I can do this doesn't mean I should do it.

And, how much doing all that MacGyvering actually takes away from my time and energy, that can be better used for something else. That I'm the only one who can do.

Karen: Yes. And you do have to, now you have to go find your dopamine hit some other way, which is also a bummer. But I think the thing that you get back is the impact.

So you can either have the things that turn you on and turn your ego on and you know, the sailing in and the, and the figuring it all out, no one, but you can do it. Or you can think about impact, cuz that will limit your impact. You might be having fun while you do it, but it will limit your impact.

And if you have a mission, I know you are, you're a mission driven lady and you're a mission driven business. And if you wanna expand your impact, you do have to, division of labor, right. And your scope is not the doer and the toucher and the, you know, the figure out anymore.

Nancy: Exactly. So one of the things I'd love to talk about is in terms of my coaching academy, newly certified coaches coming out.

And we really work with them to start at the beginning to realize they are business owners, as much as they are coaches and that we really have to own the fullness of that. It's not just, you know, if I build it, they will come. Or if I hang a shingle, someone will come, someone will come knocking. The whole idea of promotion, the whole idea of really allowing ourselves to be visible and attracting the clients to us.

And for many of us, we started, I started out all by myself in the beginning, and then I hired my first virtual assistant for literally 10 hours a month like that for a while. That's who I had before I built my team. And it's interesting, I think now, and I'm very curious to hear what you think about sort of building a team from scratch.

You know, what would you have people look for in a first hire? Whether it's, freelance contract employee, whatever it, whatever it looks.

Karen: Yeah. So a first hire is usually, it's usually offloading while there's two types, there's offloading sort of the, the routinized, or very easy to scope and delegate work, which is some of the more just execution type elements.

And that can free up, it has to get done. And it, it can free up not just like your hands, but it can free up your brain. And, you know, just like we, you were saying it's sort of the very beginning of not being bogged down in those kinds of weeds so that you can, be the talent in your own organization.

The other way to do it is to. Experts in the areas where you are not the expert come in and maybe they only touch your business for like a VIP day. Or something similar or a limited engagement, but they come in and they supply skills and expertise that you don't have. And that it would take too long to DIY, to read on Google, but it can really catapult your business.

So those are two they're not really opposing, but they're two totally different. Ways to spend money and ways to get help. They're both important. And it's really just kind of, it really just depends on who the person is and what the, where they are in their business and what they feel their strengths and weaknesses are.

But I would, one of the things I would love to have people think of, they almost immediately think of the VAs as their very first hire. And I would like us all to consider, when you step back and go, what is the engine that drives my business? That is the marketing and sales side and investing in expertise on that end isn't a bad ROI.

You know, you should get your money back in spades and have the volume come in. And then you can think about maybe delegating the VA. So it's really, it's really something to think about which way you're gonna go first.

Nancy: I really appreciate you sharing that. One of the things that I'm really aware of is it can be very overwhelming to just be, a solopreneur and it can also feel overwhelming to know how do I begin bringing someone else in? Getting rid of the mindset of, it's just easier to do it myself than teach someone else. I think that's a big mindset shift, which I'm sure you deal with your clients around.

Karen: Yes. Yes, yes, yes, of course it is. And it, and the thing is there is no smoke and mirrors that changes that at the beginning, it is more of a pain to scope work ahead of time and delegate it out.

If anyone is trying to put lipstick on that, they're fibbing, it is not true. But again, it's an investment. You can do a dollar investment, you can do an energy and effort investment. It is worthwhile to do the investment because once you can get that successfully delegated, then you don't have to worry about it.

But yes, there will be some iterative moments where you're both working together in order to get what you want done.

Nancy: Yeah. And I think for me, ultimately, even in the beginning, when I hired the first person, I really looked at it like I'm buying my own time back. You know, that was, that was more important to me.

That was a priority to me. And so I think it does come down to, you know, How much time and energy do I wanna be putting into things that I don't love doing and that I'm not the best at doing

Karen: Yes. And it's, and it's the temptation is to think of it only as a cost center. Right. And what you're saying is in just in the, using the English words, which is, if I had more time, I could build this business faster and building this business faster means more clients, more revenue.

Nancy: Exactly, exactly. I'm curious. What might you also invite new coaches, new entrepreneurs to think about as they venture out on their own for the first time?

Karen: I think building intentionality into your project planning is. Listen, I sometimes I'm in seven figure businesses who don't have any intentionality in their project planning business.

I get the call that says, oh, listen to a podcast last night, let's scrap the launch and do something different. I mean, they're, it is just all over the place. And so what I'm not saying is don't ever pivot, right? What I'm not saying is don't ever change your mind but be intentional. See if you can't set project plans for the.

Have a quarterly goal in chip away month by month in getting to that goal with the latitude to pivot or change your mind or something really big happens. And you wanna change things up, but have a scratch pad where you're actually marking down your intentions and what your projects are and see if you can't spend 80% of your time chipping away at what you said was a priority.

And the 80/ 20 rule works great. So with the freedom again, to change it up because this is learning right.

Nancy: Well, you just share the 80/ 20 rule Pareto Principle is that, right?

Karen: Yeah. Yeah. Yeah. So that's the thing, which is 80%, 20%, 80% of the results come from 20% of the effort. This is more, just 80% of your time should be on the slow, the important, but not urgent stuff.

And the 20% can be just, I don't know, whatever happens in a business that you know, that you didn't expect and you didn't slot for, but if you do that monthly, see how close you get. Maybe by month, three and four and five, you're actually doing a great job of picking priorities and working towards them and seeing them realized in your business.

And then you go get more. I think I've probably said this to you, but if you think about this, if you have to move, I don't know, 50 things down the football field. What you don't wanna do is try to pick up 4, 5, 6, 7, 8, and run with them all towards the (fifty yard line), you know, you wanna take two or three pick 'em up, run to the finish line, put 'em down and go get the others.

That's how you move quickly. It's not less. It's less at one time. And that's the intentionality of the planning process no matter how big you are as a company. Make set some intentions, corral your attention and your focus on those things. See if you can't complete them and then go get more.

Nancy: I love that. I love, I love that whole football field thing.

Karen: I think of like people with spoons running around, you know, because that's really kind of how it is over here.

Nancy: Well, it's true. And then, there's also, and I know for many people it's like, okay, let me pick up as many as I can carry and then half, a quarter of the way down, everything tumbles, and then it's even more frustrating, and more overwhelming, and things don't get finished.

And like you said, this is really something I've definitely adopted in the, the intentional vision I'm holding for the company and anything that doesn't serve that vision is a no. And so really looking at those 50 boxes and really seeing like, matches my vision, what is going to help me bring my vision to fruition here?

And I'm only going to carry that.

Karen: One hundred percent. And what you just said earlier was it won't all get done. It won't all get done. So either you take your, you take your losses up front or you take your, you say no upfront and you focus or you try to say yes to too many things. And then it's a crapshoot about what gets done and what doesn't.

So it's not all gonna fit, but you can either be intentional about what does fit or you can let happenstance tell you what fits. And so the intentionality is always, always better. It's always better.

Nancy: So this seems like a lovely segue into one of my favorite topics – boundaries. oh, yes. And I'm curious about how you work with your clients around their boundaries and also your own?

Karen: Well, my own, the story of me having boundaries is a long story. It's like a country song and we don't have 26 verses to sing here. Boundaries came to me probably the last several

years. That's how, that's how, gosh, the lack of boundaries, I can actually look back on my careers, my romantic relationships and things like that.

And just almost pinpoint what went wrong because I have a, I have, you know, codependent patterns and behavior that I have come to realize, and then worked on through the recovery process, through the 12-step process, actually. And so, I've come to a realization about who, you know, what my instincts are and then what my better thoughts, my better angels when they get a chance to speak might be doing so even, even negotiating this gig world as a consultant has been a journey.

And I can say that the last, maybe two years have been the most boundaried business years of my life, they've been the happiest and they have been the most financially successful for me. So how about that? It is super scary to put boundaries on what you're saying that you're gonna do for clients.

It's scary. but wow. I talk about turning a corner. I was able to turn a corner.

Nancy: I love hearing this and I love this for you. And it just goes to show that when we set these boundaries and we are really clear and we hold them. We are honoring ourselves. And as you said, you've been the happiest and you've been the most financially successful.

Karen: Yes.

Nancy: Love it.

Karen: And it's actually been a business model change for me. I used to be embedded on teams and for me, this isn't for everyone, but for me, being embedded on a team and maintaining boundaries was very, very tricky for me. And once I pulled back and decided to ship advice and consultancy only, which by the way, is a scary thought for an ops person, because I'm not clicking the button. I assumed everyone. That's why that's. That was the value I had in the marketplace was I was the doer, not the strategizer, but once I pulled back and said, Hey, I wanna try this out. I wanna see if this flies. It did.

I'm super happy and super involved in businesses. You know, I have long term clients who retain our clients for whom I am able to help shape their teams and their businesses ongoing, but I'm not the person getting the 6:00 AM slack.

So I'm super happy. And I actually am in a position where they listen better, really. They listen better to an outside person than somebody on the team and, you know, and we can actually cut down on those 6:00 AM slacks, no matter who they go to.

Nancy: Right. I love that. I love it. And I love that you took that leap because I think when we first met, you were.

You know, on at least one team that I know of you were, you held a position and then you were doing the consulting work as well. So I love that you actually took yourself out of that. And are doing what you love to do best.

Karen: Yep. And you were, I think you were my first customer as I began transitioning to just consultancy only. So you actually landed in my inbox and sort of proved to me that this might actually have some legs to it.

So thank you for playing your role.

Nancy: You are welcome.

Hi. Before we get into the next half of today's episode, I wanna make sure you know, that my next book is coming out very soon. It's called *The Art of Change: a guided journal, eight weeks to making a meaningful shift in your life*. While this is my sixth book, *The Art of Change* is very unique. From the other books I've written in it, I provide a guided eight-week journaling process that has proven to make the changes you desire happen in your life.

This model of reinvention has been tried and tested over many years and will teach you to bring what you want into your life while releasing what no longer serves. For a limited time when you order *The Art of Change*, you can claim a special bonus audio. I recorded called *Eight Dimensions of Reinventing Yourself*.

This audio is the perfect companion to *The Art of Change* and will go on sale soon after the book is released. But for a short time, we are offering it to you for free. Go to Nancylevin.com/journal. To learn more about *The Art of Change* and to claim your bonus.

So I'm curious about what it's like with your clients, working with them around boundaries.

Karen: Yeah. So it's I work with both leaders and sort of like the second in commands, no matter what name they have. And it is an exercise in coaching on both sides and largely it is a matter of, well, speaking your needs.

So there's no mind reading. That's I feel like that if there is a drum that I beat it is you didn't hire for clairvoyance so you have to spit it out. No hidden yard sticks. If you're secretly using it to say whether the project is successful or not, or the performance is successful or not, you have to speak it, you have to speak it out.

So a lot of times I'm sort of like playing that role in sort of surfacing constraints, because it's not that people are sitting there going, well, I'm just not gonna say things, you know, that's not what they do. They don't think about it. Like it's not, it helps to have me on the other side of the desk, sort of pulling it out and sort of surfacing assumptions and hidden assumptions and things like that. And then I work, so because I work both sides, it's actually, it's actually easier if you're able to coach both sides because then you can sort of have them come together.

Nancy: Yeah.

Karen: But yes, I do feel, especially on the leadership side, it.

What you outlined, which is you have to make your decision. Do you want to have a larger impact and stay in the CEO, but staying in the CEO chair means don't swoop. And swooping is such a tendency. And I know you picked up on that word and ran with it.

Nancy: Yes. Oh my goodness. And Kylie and I, Kylie and I talked about that on the podcast we did, it is literally part of our lexicon now, swooping, which, why don't you explain to the listeners what that is?

Karen: Oh, well, it's exactly what it sounds like. It's with the best of your intentions, you have tried to get hands off on something. Delegated it down. And for whatever reason, whether it's internal or external, you're itching to get back in there and son of a gun, you just did, you just showed up and did something that is, that you probably didn't want to do, or maybe you felt you had to do.

And if you feel you need to do that, it's one of those things where I'm not trying to, again, say never, never. But it's, let's do a postmortem and figure out why that felt, why you felt that needed to happen and how can we fix it systemically so that you don't so that those occasions get less and less and less.

Nancy: Yes. And you know, it was a huge revelation to actually begin looking at what feelings were arising that had me impulsively swoop.

Karen: And what were they? Can you name some?

Nancy: Yeah, I mean, well, whether it was my impatience, you know, I want this done and I want it done now. And it's a time when no one else is working.

So I'm just gonna do it myself. And what that doesn't do is it doesn't allow for the person to learn how it needs to be done if I just come in and swoop and do it. And usually that's sort of the itchy feeling to swoop is that is for me mostly impatience now. It's less about not trusting or less about no one can do it but me. It's more, no one's doing it on the timeline that I want it.

That's just me wanting a timeline because Kylie is the most anal organized person. She's got the timeline figured out of what we need. It just might not be what I think I want. So, yeah, it's usually just swooping from like, I want it and I want it now.

Karen: Yeah. And that's, that's one of the great things about being able to work with someone like Kylie who has just that groundedness and that sort of head on her shoulders.

Who actually has a project plan with a due date. That's okay dependency-wise.. And then I feel similarly a lot of times, and I have to check my own urgency and try to figure out what's behind it. And a lot of times it's just, that's just hustle culture. Patriarchy. I mean, that's just, that's...

Nancy: Amen.

Karen: That's just my business. And I'm trying to make it other people's business and it's false. It's like a false sense of urgency. It doesn't need to get done.

Nancy: Totally. The other thing...

Karen: There's more work for me to do internally when I feel that way.

Nancy: Exactly. So now I'm really aware of, oh, the feeling is arising to swoop. I don't need to swoop. What clear instructions or directions do I need to give or who do I need to ask for some answer, something like that. The other thing that I really think about a lot, from you, is what does done look like. Cause that was something that especially when I was used to just sort of holding everything in my head and I had some idea, and this is what you were talking about, sort of the, the hidden yard stick or whatever.

I. In my, I knew what done looked like, but I hadn't shared what done looked like with the team or with whoever was actually handling the project.

Karen: You know, and this is another, because the skill didn't need to be developed until you started working with the team. So in our solo days, we did not have to paint a picture of what done looked like.

We followed our notes. We did some work and we sat back and we looked at it and went and we leaned back in and we did some more work. So we never had to develop that skillset, but it, it actually is a visionary skillset because you're enrolling people into your vision. You're painting a picture of what done looks like, and it doesn't always need to be physical, like it's three pages long with the, this and the, that it can be.

It feels this way. It causes somebody else to take this kind of action or, you know, it could be sort of the, the looser more intangible things, but there are constraints and, and those are constraints. Those are just like, tell me what's the boundary. Tell me what the scope is. Well, I need it to be done by this date and feel this way and act this way.

And by god, it needs to do this one. Really well, and then you step back and allow their creativity to go meet those constraints, meet those specs, really, but it is a dance and it absolutely is something to learn. I learned it in Silicon Valley. Because that is exactly how you think about features.

Nobody says build something that goes under the file menu and three things down, it's this word. And it's like, that's not how they build features. They talk about the use case. They talk about the needs of the customer and they don't, they're like go find a way to make the customer feel this way or be able to do this one thing.

Nancy: Right.

Karen: And they allow all that creativity, but they did bound it. They didn't say go make up anything you ever wanted, you know, so they have an art of shaping it enough and then

stepping back. And maybe that was my early exposure to, to that kind of backing and forth thing that allows me to kind of step in.

I do consult on that quite a bit. That is just an area where a lot of people. Coaching and support and, and just lots of trial and error really to get that out.

Nancy: Yeah. I'm curious. So you mentioned that's one area that you coach a lot around. What are some of the other sort of hot topics that you find you are working with people around?

Karen: Yeah. You know I feel like a lot of times, and this makes sense clients come to me with what they think are performance issues on their team. Somebody's not hitting a deadline or there has to be too much swooping, too much legit swooping to get in there and get something.

And so it presents as a performance problem. And I say, okay, but let's, let's back up. Have you been transparent with your expectations and have you secured consent? Did you secure agreement? So let's go back. Did you spit everything out? And then did you ask her, like sometimes on remote teams, software allows us to, I can put your name on it, Nancy and put next Tuesday's date.

And somehow, I think, you know, and everyone's doing that to you, right? There's five other people on the team, all putting your name in next week's due date on there. And I have never asked you to sort of weigh-in, going, did I give you everything you needed, Nancy? and can you get it done, given all your other work?

Can you get it done on Tuesday? So you have to build in that sort of agreement where somebody has the time, the space and the safety to read it over and go. Karen, you didn't give me half of what I needed and no way can I get this done by Tuesday and have it feel safe and to bake it in there so that it isn't this long, big, drawn out dance.

So I'm gonna get better at spitting it out, but I'm also gonna be asking you is Tuesday good. If it's Tuesday, good. Give me a thumbs up in the software, you know, just click the part. And I know that we're good. Yeah. But if you don't then I know that something's amiss.

Nancy: Right.

Karen: And now if I spit everything out, I've asked for your, I've asked you to sign up, to get it done.

Now let's go see if we have a performance problem. Right? So it's sometimes it's not the performance pillar. You have to backtrack to, you know, systemically and get them set up for success. And then let it play out to see if there's a performance issue.

And I have found that framework, which I basically developed almost in self-defense because I kept getting so many of these. And now it's my way of actually coaching on performance is let's backtrack and make sure we have all the elements in place for them to perform. Great. So that's really kind of streamlined things.

Nancy: Speaking of that, one of the other things that Kylie and I refer to all the time is the four C's.

Karen: Oh yes.

Nancy: So maybe you wanna. Maybe you wanna share a bit about that?

Karen: Yeah. So the four C's is an assessment tool that I created mostly because I knew that as we were talking about people's performances and their level of expertise and their, you know, it wasn't necessarily capturing everything about how a person can perform on your team.

By and large, their ability to deal with uncertainty and their comfort level with troubleshooting is sort of was that X factor missing link that was not being factored in. And so what you can't do is tell somebody maybe telling a, I love to use the restaurant analogy. You know, the burger guy he's flipping the burgers.

He cooks 50 burgers to perfection. Every night with all sorts of chaos going on. He does his work, he focuses, but he is not the guy who's going to troubleshoot a kitchen issue. He's not going to set the schedule. He's not gonna source the shiitakes when you need them. He is the grill guy. And so you can't have a conversation with him and say, Hey, I'd like you to take more ownership.

And, you know, and, and troubleshoot some more things and maybe be a leader. And you're like, he does one thing and he does it well, and those are repetitive tasks and that is different from a kitchen manager. Who is there to take visions and find and source all of the ingredients and get everyone prepped.

And, you know, basically what Kylie and I do in the world. We're the kitchen managers of the world. But we're also not very good at, ask us to do repetitive tasks and we'll go to sleep and we won't do 'em well. You'll have a quality problem with the likes of us, if you ask us. So there are different C's, they all happen to start with 'C', which is why I call 'em the four C's where those people fit into a category.

And it's not necessarily an ascension model where, if the grill guy, right, he's gonna grow up to be a, you know, the next one or the next one, it's, they're not, it's not underperforming, you know, and if you perform better, you'll rise up.

It's just what you're good at and what you wanna be doing. So a lot of times when we hire VAs, they're the equivalent of the grill guy. And suddenly we want to, but we, what we need them to, we need to have more things done in our business. And we can't turn to our VA and say, I'd like you to take more ownership and develop a strategy for blah, blah, blah.

Even if she's, you know, if that's her, her area of the business, it doesn't necessarily lend her. She won't necessarily be the person who can do that. And you need, it's not a flaw.

Nancy: Right, right.

Karen: He just needs to be plugged into the right part of the, of the org chart. And you need to have the right people in the different layers of the org chart.

Nancy: So can you say the four C's in your restaurant analogy, just so that we can put it together.

Karen: So I had it as Clerks at the bottom. Yes. And that kind of is the, you know what. Clerks make the world go around.

Nancy: Absolutely.

Karen: They make the, they are worth their weight in gold and then Custodians are the ones above it and they can take a little bit more of a, of a project scope.

They just a little bit more area of responsibility. They'll still probably just raise their hand if something goes wrong and they'll say, Hey Nancy, something's, something's amiss here. Something's going wrong, you know, that kind of thing. And then there's Champions above them and then C-suites are above them.

And so. Again, it is. If you're sort of mentally placing yourself on one of the four C's, what it isn't is an opportunity for you to wish you were somewhere else in the four C network it's to double down on what you do great. And to, and to make sure that you're not, and that you're placed correctly and so that you can thrive.

Nancy: And I think this was really a revelation. The piece of going through the whole team and realizing which C they were, each person. And also what you said before, it's not an ascension model. So it's not that a Clerk is gonna grow into a C-suite. Right. But it, like you said, doubling down on what each, what each role does and what it does best because it takes all four C's.

Karen: Yes, it does. And it right. It absolutely does. And I know you know, there's actually a Custodian that I love in the world that I drag her to nearly every client I work with, but I do have to sort of scope the work in a particular way for her. And I have to manage expectations.

I go, she's amazing. But what she isn't going to do is all of these other things that you think amazing people should do. She's not going to set your strategy. She's gonna say right. That something, she's gonna raise her hand and say, something's not quite right, but it's up to somebody else on the team to swoop in and troubleshoot, swoop in a good way. Right. And swoop in a good way. And to unpack it, she's gonna notice, but she's, she doesn't have the wherewithal, but you know what? You give her something, she doesn't make errors. She does this work beautifully, on time, quickly, without errors.

And I just love working with her. I don't see how a business can get around without the, without those kind of people who just love their craft. Yes. I think of Jiro Dreams of Sushi. Do you remember that documentary?

Nancy: No, I haven't seen it.

Karen: Oh my gosh. It's maybe a decade older, so, but he's a, he's just a guy who makes sushi.

Nancy: Okay.

Karen: But he makes the most beautiful, beautiful sushi ever. And he is a sushi master. And so there are folks out there who do their work. Who do it. They it's their craft. But that's what they do. He's not a CEO. He doesn't run this and ship that he just does his work. But he does it beautifully and he takes immense pride in it.

Nancy: Yeah. And I think that's the piece too, really taking pride in that specific craft. I love that. For you. So it seems like you must be doing lots of different things every day.

Karen: I do, well, I have a set of, I have a niche that I love these days, which is right. Pretty much what we've been talking about.

The companies that have seen the initial success and the sales volume, and they're kind of breaking everything that was ad hoc and, good enough in the back office. And now good enough is not sufficient to them, to the occasion. And so I kind of sail in at that point and give them a new org chart and, and give them some skills and some, a lot of the work that you and I did together, just the tools and the trade craft in order to sort of get that corner turned so they can continue to scale.

So while the clients are different and the verticals are quite different, that's one of the delights of, I'm not just in the online coaching space. I have, eCommerce folks, I have services, but you know, items as well and just a blend they're worldwide, Singapore, cutter in the Middle East, you know, everywhere.

And but I still feel like what I do is very similar and very same, but different in a way. So I enjoy it.

Nancy: Yeah. I love it. I'm so happy for you. The name of this podcast is Your Permission Prescription. So I'm curious what you would like to invite the listener to give themselves permission for.

Karen: I think I would like to invite them. So I think I'm going to draw from my personal, not the advice that I give professionally, but from my personal experience, and especially my personal experience of the last couple years where I finally did put boundaries in place. And change my business model in order to support those boundaries.

And then I, , I happen to like work really hard and have 18 months pass, and then I saw success. But I would like to invite folks to do that earlier in their business. To really be brave. And even when it feels scary, especially scary financially to not, to not be every answer to every question that your client could ever ask you, but to specialize to niche and to put those boundaries up about what turns you on to provide in the marketplace.

I invite us all to double down on that because there's enough of us out there. And if we all, if we all sit in our genius stones, can you imagine like what a great vibrant community and you know, world this could be. If we were all just. Happier and, and really understanding what it is we're here to do in the world and doing just that.

Nancy: I love this so much, Karen. Thank you. Gosh, it's been such a joy to talk to today. Where can the listeners find you and follow you?

Karen: Yeah, so I am active on Instagram and that's Karen dot Sergeant. And I'm also inviting you to come to my website, which is Karensergeant.com.

Nancy: Thank you. I'm really so happy for everything that you're up to.

Karen: Thank you. This was so fun.

Nancy: Yay. Thanks for being here. And for everyone listening, I'll be back again next week.

Thanks so much for listening to today's episode. If you loved what you heard, I'd be so grateful. If you'd leave a review and share your experience. Even better follow this podcast. So you never miss a new episode. And if you'd like some extra support or guidance, head over to my Transform Together, Facebook group for an engaged community where you can speak your truth, receive inspiration and ask for help as you navigate life's journey or visit my website, Nancylevin.com.

Where you can find resources to help guide your path to reclaiming. What's truly important to you. Thanks again for joining me.

YPP ep 64 Mixdown

Karen: One of the things I would love to have people think of. They almost immediately think of the VAs as their very first hire. And I would like us all to consider, when you step back and go, what is the engine that drives my business? That is the marketing and sales side and investing in expertise on that end isn't a bad ROI.

You know, you should get your money back in spades and have the volume come in. Then you can think about maybe delegating the VA. So it's really, it's, it's really something to think about which way you're gonna go first.

Nancy: Hi, and welcome to Your Permission Prescription, the podcast that shows you how to confidently say yes to you and consciously create the life you desire. Hopefully you've heard the big news by now. My next book is coming out on September 6th. It's called The Art of Change: a guided journal, eight weeks to making a meaningful shift in your life.

Now, this is so much more than just a journal. This guided journal is based on a powerful process I developed and it's proven to help people make big, meaningful changes in their lives

that actually stick. The Art of Change is the next best thing to having me buy your side, providing you with tools and prompts to bring about the changes you want in your life.

And to celebrate the release of my sixth book. I've got a gift for you for a limited time. Everyone who orders, The Art of Change will be able to claim a very special bonus. I recorded an audio program called Eight Dimensions of Reinventing Yourself. This audio is the perfect companion to The Art of Change, and we'll go on sale soon after the book is released.

But for now, we are offering it for free to everyone who orders my book in Eight Dimensions of Reinventing Yourself. You'll receive specific teachings on the concepts of reinvention to contemplate. You'll be guided through explorations of discovery so you can take action and you can keep me in your ears, just like you do when listening to my podcast.

You can learn more about The Art of Change and how to claim your bonus at Nancylevin.com/journal. Now let's get into today's episode.

Welcome back to another episode of Your Permission Prescription. I'm super excited today for our guest. I'm going to introduce you to Karen Sergeant. She's a team growth strategist and advisory COO. She helps business owners survive their growth spurt, grow their teams and build a strong culture based on consent and accountability.

Her mission is to empower CEOs with the operational confidence to lead their team and grow their business. She's based in Tucson and works with clients around the world.

Nancy: Hi, Karen.

Karen: I'm so happy to be here, Nancy. Thank you.

Nancy: Yay. And for anyone who happened to listen to the year anniversary episode that I did with my COO, Kylie, Karen is the coach we mentioned working with. We were so fortunate, right?

As I brought Kylie in, as my integrator, Karen worked with the two of us for a couple of months and it changed everything. And we still refer back to our time with you Karen today.

Karen: That is so thrilling to hear. Yeah, that was, that was a good fall. I enjoyed that.

Nancy: Yes. So, you know, I will also really credit you for having me step into the role of CEO.

You know, I had, at that point, really been thinking of myself as an author or a coach, or, you know, even if I already had my training program, but it was really new to look at myself as the CEO of my business. And when we did work with you, we were working in a framework around how to not be the bottleneck in our own business.

And from that came my motto I will only do what only I can do. And I'm proud to say that that has stuck.

Karen: That is that's so fun. And you know, that moment, that corner that you turn when you are. You know, you're a solo and then you're a solo plus, and then it gets big enough and you actually do have to turn a corner if you wanna continue to grow.

You do have to stop doing some things and start being the CEO, or you can decide not to, but you, but it is a sea change across so many fronts. It's really not simply just go get more head count. There's behaviors, there's mindsets. And I was so curious, like what for you, what do you think you were bumping up against?

Before you turned that corner, what was it that you finally turned and stepped into CEO?

Nancy: Yeah, I think, as much as I hate to admit it, I think I was still a bit afraid to let go. I wanted to control everything. I wanted to have my hands and eyes on everything. I thought that I had to do everything, you know, so there were a lot of beliefs involved.

There was a, there was a big mindset shift and it really, all of it became possible because I did find someone in Kylie who I really trusted to handle the things that had been living only in my head.

Karen: And I remember Kylie saying something like it's, it's like a couple, you know, a couple realizing what each other's love languages are and being able to speak it.

So, so part of what you're saying is it felt unsafe to delegate down because not only were there not necessarily going to do it exactly the way you had it in your brain. But maybe they weren't even going to come close and you would need to get in there and rework, and that's not fun for anybody either.

So there is a skill set, like it's not just mindset and it's not just like thinking the thing, thinking the right things. You do need some actual skills and some templates and some learning to get the stuff out of your head and organized for your team to go execute on. And that was kind of the moment that I was able to show up in and, and give you both those tools.

Nancy: Exactly. Because even when I delegated something or it was someone else's responsibility to get it done, I was still holding it. And the big shift came when I realized, oh, I can actually give this to someone else to hold so that I have space and capacity for creativity, for doing new things.

And part of it, what I realized like a big shift I recognized was that before I would just sort of squeeze things into my day, like squeeze in a video that I had to make or squeeze in a podcast, or squeeze in something I needed to write. And then what happened? All of those things, the content creation became my own tasks.

I didn't have to squeeze them in. They were, what I was really doing instead of actually all the other stuff. It was great.

Karen: Oh, that's tremendous.

Nancy: Yeah. You have a really interesting background. So I have to, I first have to ask you to share it because I find it fascinating.

Karen: Yes, well so I'm kind of in like the third chapter of my career arc. My first was out of college. I was in Silicon Valley during the Dot Com boom in the nineties. And I was working for a software company. Everyone in Silicon Valley worked for a software company. And what was really great about that is there were some really superstar managers and directors that I had access to the, just the B school graduate or not B school, business school graduates. And they just tremendous knowledge transfer and I learned a lot, and then I ditched everything and moved to the beltway and I worked for the government in counter terrorism.

And that unfortunately was also sort of a boom.

Nancy: Yeah.

Karen: Because I was on the bin Laden desk about just a few months before the September 11th happened. And then I kind of stepped onto this accelerator, this gas pedal that took me through the next, pretty much decade, working counter terrorism out in the field in Afghanistan and Pakistan.

And then back in headquarters. And so both were these growth periods and they were both kind of the wild, wild west. So lots of changing shifting priorities, shifting budgets, uncertainties, like my, my ability to, to motivate people and to lead a project through uncertain times and high risk situations were really kind of where I made my bones.

And then I burnt out. So completely badly that I had to, I had to leave. That was my first love for the counter terrorism and I had to quit my job, sell my house. I moved to the ocean and just licked my wounds for a couple years. Just trying to get everything back and regulated.

And then I was like, well, what do I, what can I do? And I was trying to think of these transfer. Like you can't do counter terrorism from the beach, unfortunately. So you have to think of another career move. And so I thought about the fact that I did lead teams and people and projects, and that was the kind of transferable skills that I figured I could go and sell on the gig economy. And here I am.

Nancy: When you said that you really thrived working with people in uncertain times and sort of instability. I mean, hello, here we are. Yes, I know. Right.

Karen: All we have to do is wait and it comes around again. Doesn't it? I think one of my talents, it's just like kind of a funny thing, but one of my talents is keeping the main thing, the main thing.

I have very I have a very good focus when it comes to that. and I swear that both in my, my two other jobs and, and when I coach my clients, I feel like I'm saying no a lot. I'm just saying refocus, refocus, or we can change our minds. Like there's nothing wrong with changing our minds, but we have to be intentional.

Like we did say that these were the priorities and so much about. Scaling a business, not necessarily the startup phase, but the scaling phase is, is saying no to a lot of distractions and focusing and doubling down on what's working. And so I feel like, I don't know, I've been in training for 30 years to provide that. It seems to be, it seems to be the key that unlocks the scalable growth.

Nancy: I mean, I see that completely true. And you know, something that I also really learned working with you is. What got me here isn't going to take me there, you know, and I look back now at really a business that I started with duct tape and throwing spaghetti against a wall. That it really now is a full-fledged operating true business.

Karen: And how do you feel about that? Because I feel like in some ways it's a little bit unfair that all of the talent and the things that you learned in your scrappy startup phase, truly aren't, what's required. Especially as the founder slash CEO. Once you turn that corner, I call those the MacGyver habits.

Nancy: Totally.

You know how you were, MacGyvering everything you were 11th hour, you were Jerry rigging, scotch tape, duct tape, whatever that is not something to scale on, but that is how you got to the point where you're looking at turning the corner and scaling, but you do have to throw it all out and do something different.

And I'm just wondering, how does that feel in, in your seat when you have to confront that?

Nancy: Yeah. I mean, for me, I also look at it very much through the lens of 20 years of being an event producer, which is very much being a firefighter, and there's a lot of MacGyvering all day long and it was all I knew.

It was really the only way I knew to do anything was to just be in that like high alert, full on mode. And so, part of the process of me, delegating and trusting and leaning on others was really the decision that I ultimately made that just because I can do this doesn't mean I should do it.

And, how much doing all that MacGyvering actually takes away from my time and energy, that can be better used for something else. That I'm the only one who can do.

Karen: Yes. And you do have to, now you have to go find your dopamine hit some other way, which is also a bummer. But I think the thing that you get back is the impact.

So you can either have the things that turn you on and turn your ego on and you know, the sailing in and the, and the figuring it all out, no one, but you can do it. Or you can think about impact, cuz that will limit your impact. You might be having fun while you do it, but it will limit your impact.

And if you have a mission, I know you are, you're a mission driven lady and you're a mission driven business. And if you wanna expand your impact, you do have to, division of labor, right. And your scope is not the doer and the toucher and the, you know, the figure outer anymore.

Nancy: Exactly. So one of the things I'd love to talk about is in terms of my coaching academy, newly certified coaches coming out.

And we really work with them to start at the beginning to realize they are business owners, as much as they are coaches and that we really have to own the fullness of that. It's not just, you know, if I build it, they will come. Or if I hang a shingle, someone will come, someone will come knocking. The whole idea of promotion, the whole idea of really allowing ourselves to be visible and attracting the clients to us.

And for many of us, we started, I started out all by myself in the beginning, and then I hired my first virtual assistant for literally 10 hours a month like that for a while. That's who I had before I built my team. And it's interesting, I think now, and I'm very curious to hear what you think about sort of building a team from scratch.

You know, what would you have people look for in a first hire? Whether it's, freelance contract employee, whatever it, whatever it looks.

Karen: Yeah. So a first hire is usually, it's usually offloading while there's two types, there's offloading sort of the, the routinized, or very easy to scope and delegate work, which is some of the more just execution type elements.

And that can free up, it has to get done. And it, it can free up not just like your hands, but it can free up your brain. And, you know, just like we, you were saying it's sort of the very beginning of not being bogged down in those kinds of weeds so that you can, be the talent in your own organization.

The other way to do it is to. Experts in the areas where you are not the expert come in and maybe they only touch your business for like a VIP day. Or something similar or a limited engagement, but they come in and they supply skills and expertise that you don't have. And that it would take too long to DIY, to read on Google, but it can really catapult your business.

So those are two they're not really opposing, but they're two totally different. Ways to spend money and ways to get help. They're both important. And it's really just kind of, it really just depends on who the person is and what the, where they are in their business and what they feel their strengths and weaknesses are.

But I would, one of the things I would love to have people think of, they almost immediately think of the VAs as their very first hire. And I would like us all to consider, when you step back and go, what is the engine that drives my business? That is the marketing and sales side and investing in expertise on that end isn't a bad ROI.

You know, you should get your money back in spades and have the volume come in. And then you can think about maybe delegating the VA. So it's really, it's really something to think about which way you're gonna go first.

Nancy: I really appreciate you sharing that. One of the things that I'm really aware of is it can be very overwhelming to just be, a solopreneur and it can also feel overwhelming to know how do I begin bringing someone else in? Getting rid of the mindset of, it's just easier to do it myself than teach someone else. I think that's a big mindset shift, which I'm sure you deal with your clients around.

Karen: Yes. Yes, yes, yes, of course it is. And it, and the thing is there is no smoke and mirrors that changes that at the beginning, it is more of a pain to scope work ahead of time and delegate it out.

If anyone is trying to put lipstick on that, they're fibbing, it is not true. But again, it's an investment. You can do a dollar investment, you can do an energy and effort investment. It is worthwhile to do the investment because once you can get that successfully delegated, then you don't have to worry about it.

But yes, there will be some iterative moments where you're both working together in order to get what you want done.

Nancy: Yeah. And I think for me, ultimately, even in the beginning, when I hired the first person, I really looked at it like I'm buying my own time back. You know, that was, that was more important to me.

That was a priority to me. And so I think it does come down to, you know, How much time and energy do I wanna be putting into things that I don't love doing and that I'm not the best at doing

Karen: Yes. And it's, and it's the temptation is to think of it only as a cost center. Right. And what you're saying is in just in the, using the English words, which is, if I had more time, I could build this business faster and building this business faster means more clients, more revenue.

Nancy: Exactly, exactly. I'm curious. What might you also invite new coaches, new entrepreneurs to think about as they venture out on their own for the first time?

Karen: I think building intentionality into your project planning is. Listen, I sometimes I'm in seven figure businesses who don't have any intentionality in their project planning business.

I get the call that says, oh, listen to a podcast last night, let's scrap the launch and do something different. I mean, they're, it is just all over the place. And so what I'm not saying is don't ever pivot, right? What I'm not saying is don't ever change your mind but be intentional. See if you can't set project plans for the.

Have a quarterly goal in chip away month by month in getting to that goal with the latitude to pivot or change your mind or something really big happens. And you wanna change things up,

but have a scratch pad where you're actually marking down your intentions and what your projects are and see if you can't spend 80% of your time chipping away at what you said was a priority.

And the 80/ 20 rule works great. So with the freedom again, to change it up because this is learning right.

Nancy: Well, you just share the 80/ 20 rule Pareto Principle is that, right?

Karen: Yeah. Yeah. Yeah. So that's the thing, which is 80%, 20%, 80% of the results come from 20% of the effort. This is more, just 80% of your time should be on the slow, the important, but not urgent stuff.

And the 20% can be just, I don't know, whatever happens in a business that you know, that you didn't expect and you didn't slot for, but if you do that monthly, see how close you get. Maybe by month, three and four and five, you're actually doing a great job of picking priorities and working towards them and seeing them realized in your business.

And then you go get more. I think I've probably said this to you, but if you think about this, if you have to move, I don't know, 50 things down the football field. What you don't wanna do is try to pick up 4, 5, 6, 7, 8, and run with them all towards the (fifty yard line), you know, you wanna take two or three pick 'em up, run to the finish line, put 'em down and go get the others.

That's how you move quickly. It's not less. It's less at one time. And that's the intentionality of the planning process no matter how big you are as a company. Make set some intentions, corral your attention and your focus on those things. See if you can't complete them and then go get more.

Nancy: I love that. I love, I love that whole football field thing.

Karen: I think of like people with spoons running around, you know, because that's really kind of how it is over here.

Nancy: Well, it's true. And then, there's also, and I know for many people it's like, okay, let me pick up as many as I can carry and then half, a quarter of the way down, everything tumbles, and then it's even more frustrating, and more overwhelming, and things don't get finished.

And like you said, this is really something I've definitely adopted in the, the intentional vision I'm holding for the company and anything that doesn't serve that vision is a no. And so really looking at those 50 boxes and really seeing like, matches my vision, what is going to help me bring my vision to fruition here?

And I'm only going to carry that.

Karen: One hundred percent. And what you just said earlier was it won't all get done. It won't all get done. So either you take your, you take your losses up front or you take your, you say no

upfront and you focus or you try to say yes to too many things. And then it's a crapshoot about what gets done and what doesn't.

So it's not all gonna fit, but you can either be intentional about what does fit or you can let happenstance tell you what fits. And so the intentionality is always, always better. It's always better.

Nancy: So this seems like a lovely segue into one of my favorite topics – boundaries. oh, yes. And I'm curious about how you work with your clients around their boundaries and also your own?

Karen: Well, my own, the story of me having boundaries is a long story. It's like a country song and we don't have 26 verses to sing here. Boundaries came to me probably the last several years. That's how, that's how, gosh, the lack of boundaries, I can actually look back on my careers, my romantic relationships and things like that.

And just almost pinpoint what went wrong because I have a, I have, you know, codependent patterns and behavior that I have come to realize, and then worked on through the recovery process, through the 12-step process, actually. And so, I've come to a realization about who, you know, what my instincts are and then what my better thoughts, my better angels when they get a chance to speak might be doing so even, even negotiating this gig world as a consultant has been a journey.

And I can say that the last, maybe two years have been the most boundaried business years of my life, they've been the happiest and they have been the most financially successful for me. So how about that? It is super scary to put boundaries on what you're saying that you're gonna do for clients.

It's scary. but wow. I talk about turning a corner. I was able to turn a corner.

Nancy: I love hearing this and I love this for you. And it just goes to show that when we set these boundaries and we are really clear and we hold them. We are honoring ourselves. And as you said, you've been the happiest and you've been the most financially successful.

Karen: Yes.

Nancy: Love it.

Karen: And it's actually been a business model change for me. I used to be embedded on teams and for me, this isn't for everyone, but for me, being embedded on a team and maintaining boundaries was very, very tricky for me. And once I pulled back and decided to ship advice and consultancy only, which by the way, is a scary thought for an ops person, because I'm not clicking the button. I assumed everyone. That's why that's. That was the value I had in the marketplace was I was the doer, not the strategizer, but once I pulled back and said, Hey, I wanna try this out. I wanna see if this flies. It did.

I'm super happy and super involved in businesses. You know, I have long term clients who retain our clients for whom I am able to help shape their teams and their businesses ongoing, but I'm not the person getting the 6:00 AM slack.

So I'm super happy. And I actually am in a position where they listen better, really. They listen better to an outside person than somebody on the team and, you know, and we can actually cut down on those 6:00 AM slacks, no matter who they go to.

Nancy: Right. I love that. I love it. And I love that you took that leap because I think when we first met, you were.

You know, on at least one team that I know of you were, you held a position and then you were doing the consulting work as well. So I love that you actually took yourself out of that. And are doing what you love to do best.

Karen: Yep. And you were, I think you were my first customer as I began transitioning to just consultancy only. So you actually landed in my inbox and sort of proved to me that this might actually have some legs to it.

So thank you for playing your role.

Nancy: You are welcome.

Hi. Before we get into the next half of today's episode, I wanna make sure you know, that my next book is coming out very soon. It's called *The Art of Change: a guided journal, eight weeks to making a meaningful shift in your life*. While this is my sixth book, *The Art of Change* is very unique. From the other books I've written in it, I provide a guided eight-week journaling process that has proven to make the changes you desire happen in your life.

This model of reinvention has been tried and tested over many years and will teach you to bring what you want into your life while releasing what no longer serves. For a limited time when you order *The Art of Change*, you can claim a special bonus audio. I recorded called *Eight Dimensions of Reinventing Yourself*.

This audio is the perfect companion to *The Art of Change* and will go on sale soon after the book is released. But for a short time, we are offering it to you for free. Go to Nancylevin.com/journal. To learn more about *The Art of Change* and to claim your bonus.

So I'm curious about what it's like with your clients, working with them around boundaries.

Karen: Yeah. So it's I work with both leaders and sort of like the second in commands, no matter what name they have. And it is an exercise in coaching on both sides and largely it is a matter of, well, speaking your needs.

So there's no mind reading. That's I feel like that if there is a drum that I beat it is you didn't hire for clairvoyance so you have to spit it out. No hidden yard sticks. If you're secretly using it to say

whether the project is successful or not, or the performance is successful or not, you have to speak it, you have to speak it out.

So a lot of times I'm sort of like playing that role in sort of surfacing constraints, because it's not that people are sitting there going, well, I'm just not gonna say things, you know, that's not what they do. They don't think about it. Like it's not, it helps to have me on the other side of the desk, sort of pulling it out and sort of surfacing assumptions and hidden assumptions and things like that. And then I work, so because I work both sides, it's actually, it's actually easier if you're able to coach both sides because then you can sort of have them come together.

Nancy: Yeah.

Karen: But yes, I do feel, especially on the leadership side, it.

What you outlined, which is you have to make your decision. Do you want to have a larger impact and stay in the CEO, but staying in the CEO chair means don't swoop. And swooping is such a tendency. And I know you picked up on that word and ran with it.

Nancy: Yes. Oh my goodness. And Kylie and I, Kylie and I talked about that on the podcast we did, it is literally part of our lexicon now, swooping, which, why don't you explain to the listeners what that is?

Karen: Oh, well, it's exactly what it sounds like. It's with the best of your intentions, you have tried to get hands off on something. Delegated it down. And for whatever reason, whether it's internal or external, you're itching to get back in there and son of a gun, you just did, you just showed up and did something that is, that you probably didn't want to do, or maybe you felt you had to do.

And if you feel you need to do that, it's one of those things where I'm not trying to, again, say never, never. But it's, let's do a postmortem and figure out why that felt, why you felt that needed to happen and how can we fix it systemically so that you don't so that those occasions get less and less and less.

Nancy: Yes. And you know, it was a huge revelation to actually begin looking at what feelings were arising that had me impulsively swoop.

Karen: And what were they? Can you name some?

Nancy: Yeah, I mean, well, whether it was my impatience, you know, I want this done and I want it done now. And it's a time when no one else is working.

So I'm just gonna do it myself. And what that doesn't do is it doesn't allow for the person to learn how it needs to be done if I just come in and swoop and do it. And usually that's sort of the itchy feeling to swoop is that is for me mostly impatience now. It's less about not trusting or less about no one can do it but me. It's more, no one's doing it on the timeline that I want it.

That's just me wanting a timeline because Kylie is the most anal organized person. She's got the timeline figured out of what we need. It just might not be what I think I want. So, yeah, it's usually just swooping from like, I want it and I want it now.

Karen: Yeah. And that's, that's one of the great things about being able to work with someone like Kylie who has just that groundedness and that sort of head on her shoulders.

Who actually has a project plan with a due date. That's okay dependency-wise.. And then I feel similarly a lot of times, and I have to check my own urgency and try to figure out what's behind it. And a lot of times it's just, that's just hustle culture. Patriarchy. I mean, that's just, that's...

Nancy: Amen.

Karen: That's just my business. And I'm trying to make it other people's business and it's false. It's like a false sense of urgency. It doesn't need to get done.

Nancy: Totally. The other thing...

Karen: There's more work for me to do internally when I feel that way.

Nancy: Exactly. So now I'm really aware of, oh, the feeling is arising to swoop. I don't need to swoop. What clear instructions or directions do I need to give or who do I need to ask for some answer, something like that. The other thing that I really think about a lot, from you, is what does done look like . Cause that was something that especially when I was used to just sort of holding everything in my head and I had some idea, and this is what you were talking about, sort of the, the hidden yard stick or whatever.

I. In my, I knew what done looked like, but I hadn't shared what done looked like with the team or with whoever was actually handling the project.

Karen: You know, and this is another, because the skill didn't need to be developed until you started working with the team. So in our solo days, we did not have to paint a picture of what done looked like.

We followed our notes. We did some work and we sat back and we looked at it and went and we leaned back in and we did some more work. So we never had to develop that skillset, but it, it actually is a visionary skillset because you're enrolling people into your vision. You're painting a picture of what done looks like, and it doesn't always need to be physical, like it's three pages long with the, this and the, that it can be.

It feels this way. It causes somebody else to take this kind of action or, you know, it could be sort of the, the looser more intangible things, but there are constraints and, and those are constraints. Those are just like, tell me what's the boundary. Tell me what the scope is. Well, I need it to be done by this date and feel this way and act this way.

And by god, it needs to do this one. Really well, and then you step back and allow their creativity to go meet those constraints, meet those specs, really, but it is a dance and it absolutely is something to learn. I learned it in Silicon Valley. Because that is exactly how you think about features.

Nobody says build something that goes under the file menu and three things down, it's this word. And it's like, that's not how they build features. They talk about the use case. They talk about the needs of the customer and they don't, they're like go find a way to make the customer feel this way or be able to do this one thing.

Nancy: Right.

Karen: And they allow all that creativity, but they did bound it. They didn't say go make up anything you ever wanted, you know, so they have an art of shaping it enough and then stepping back. And maybe that was my early exposure to, to that kind of backing and forth thing that allows me to kind of step in.

I do consult on that quite a bit. That is just an area where a lot of people. Coaching and support and, and just lots of trial and error really to get that out.

Nancy: Yeah. I'm curious. So you mentioned that's one area that you coach a lot around. What are some of the other sort of hot topics that you find you are working with people around?

Karen: Yeah. You know I feel like a lot of times, and this makes sense clients come to me with what they think are performance issues on their team. Somebody's not hitting a deadline or there has to be too much swooping, too much legit swooping to get in there and get something.

And so it presents as a performance problem. And I say, okay, but let's, let's back up. Have you been transparent with your expectations and have you secured consent? Did you secure agreement? So let's go back. Did you spit everything out? And then did you ask her, like sometimes on remote teams, software allows us to, I can put your name on it, Nancy and put next Tuesday's date.

And somehow, I think, you know, and everyone's doing that to you, right? There's five other people on the team, all putting your name in next week's due date on there. And I have never asked you to sort of weigh-in, going, did I give you everything you needed, Nancy? and can you get it done, given all your other work?

Can you get it done on Tuesday? So you have to build in that sort of agreement where somebody has the time, the space and the safety to read it over and go. Karen, you didn't give me half of what I needed and no way can I get this done by Tuesday and have it feel safe and to bake it in there so that it isn't this long, big, drawn out dance.

So I'm gonna get better at spitting it out, but I'm also gonna be asking you is Tuesday good. If it's Tuesday, good. Give me a thumbs up in the software, you know, just click the part. And I know that we're good. Yeah. But if you don't then I know that something's amiss.

Nancy: Right.

Karen: And now if I spit everything out, I've asked for your, I've asked you to sign up, to get it done.

Now let's go see if we have a performance problem. Right? So it's sometimes it's not the performance pillar. You have to backtrack to, you know, systemically and get them set up for success. And then let it play out to see if there's a performance issue.

And I have found that framework, which I basically developed almost in self-defense because I kept getting so many of these. And now it's my way of actually coaching on performance is let's backtrack and make sure we have all the elements in place for them to perform. Great. So that's really kind of streamlined things.

Nancy: Speaking of that, one of the other things that Kylie and I refer to all the time is the four C's.

Karen: Oh yes.

Nancy: So maybe you wanna. Maybe you wanna share a bit about that?

Karen: Yeah. So the four C's is an assessment tool that I created mostly because I knew that as we were talking about people's performances and their level of expertise and their, you know, it wasn't necessarily capturing everything about how a person can perform on your team.

By and large, their ability to deal with uncertainty and their comfort level with troubleshooting is sort of was that X factor missing link that was not being factored in. And so what you can't do is tell somebody maybe telling a, I love to use the restaurant analogy. You know, the burger guy he's flipping the burgers.

He cooks 50 burgers to perfection. Every night with all sorts of chaos going on. He does his work, he focuses, but he is not the guy who's going to troubleshoot a kitchen issue. He's not going to set the schedule. He's not gonna source the shiitakes when you need them. He is the grill guy. And so you can't have a conversation with him and say, Hey, I'd like you to take more ownership.

And, you know, and, and troubleshoot some more things and maybe be a leader. And you're like, he does one thing and he does it well, and those are repetitive tasks and that is different from a kitchen manager. Who is there to take visions and find and source all of the ingredients and get everyone prepped.

And, you know, basically what Kylie and I do in the world. We're the kitchen managers of the world. But we're also not very good at, ask us to do repetitive tasks and we'll go to sleep and we won't do 'em well. You'll have a quality problem with the likes of us, if you ask us. So there are different C's, they all happen to start with 'C', which is why I call 'em the four C's where those people fit into a category.

And it's not necessarily an ascension model where, if the grill guy, right, he's gonna grow up to be a, you know, the next one or the next one, it's, they're not, it's not underperforming, you know, and if you perform better, you'll rise up.

It's just what you're good at and what you wanna be doing. So a lot of times when we hire VAs, they're the equivalent of the grill guy. And suddenly we want to, but we, what we need them to, we need to have more things done in our business. And we can't turn to our VA and say, I'd like you to take more ownership and develop a strategy for blah, blah, blah.

Even if she's, you know, if that's her, her area of the business, it doesn't necessarily lend her. She won't necessarily be the person who can do that. And you need, it's not a flaw.

Nancy: Right, right.

Karen: He just needs to be plugged into the right part of the, of the org chart. And you need to have the right people in the different layers of the org chart.

Nancy: So can you say the four C's in your restaurant analogy, just so that we can put it together.

Karen: So I had it as Clerks at the bottom. Yes. And that kind of is the, you know what. Clerks make the world go around.

Nancy: Absolutely.

Karen: They make the, they are worth their weight in gold and then Custodians are the ones above it and they can take a little bit more of a, of a project scope.

They just a little bit more area of responsibility. They'll still probably just raise their hand if something goes wrong and they'll say, Hey Nancy, something's, something's amiss here. Something's going wrong, you know, that kind of thing. And then there's Champions above them and then C-suites are above them.

And so. Again, it is. If you're sort of mentally placing yourself on one of the four C's, what it isn't is an opportunity for you to wish you were somewhere else in the four C network it's to double down on what you do great. And to, and to make sure that you're not, and that you're placed correctly and so that you can thrive.

Nancy: And I think this was really a revelation. The piece of going through the whole team and realizing which C they were, each person. And also what you said before, it's not an ascension model. So it's not that a Clerk is gonna grow into a C-suite. Right. But it, like you said, doubling down on what each, what each role does and what it does best because it takes all four C's.

Karen: Yes, it does. And it right. It absolutely does. And I know you know, there's actually a Custodian that I love in the world that I drag her to nearly every client I work with, but I do have to sort of scope the work in a particular way for her. And I have to manage expectations.

I go, she's amazing. But what she isn't going to do is all of these other things that you think amazing people should do. She's not going to set your strategy. She's gonna say right. That something, she's gonna raise her hand and say, something's not quite right, but it's up to somebody else on the team to swoop in and troubleshoot, swoop in a good way. Right. And swoop in a good way. And to unpack it, she's gonna notice, but she's, she doesn't have the wherewithal, but you know what? You give her something, she doesn't make errors. She does this work beautifully, on time, quickly, without errors.

And I just love working with her. I don't see how a business can get around without the, without those kind of people who just love their craft. Yes. I think of Jiro Dreams of Sushi. Do you remember that documentary?

Nancy: No, I haven't seen it.

Karen: Oh my gosh. It's maybe a decade older, so, but he's a, he's just a guy who makes sushi.

Nancy: Okay.

Karen: But he makes the most beautiful, beautiful sushi ever. And he is a sushi master. And so there are folks out there who do their work. Who do it. They it's their craft. But that's what they do. He's not a CEO. He doesn't run this and ship that he just does his work. But he does it beautifully and he takes immense pride in it.

Nancy: Yeah. And I think that's the piece too, really taking pride in that specific craft. I love that. For you. So it seems like you must be doing lots of different things every day.

Karen: I do, well, I have a set of, I have a niche that I love these days, which is right. Pretty much what we've been talking about.

The companies that have seen the initial success and the sales volume, and they're kind of breaking everything that was ad hoc and, good enough in the back office. And now good enough is not sufficient to them, to the occasion. And so I kind of sail in at that point and give them a new org chart and, and give them some skills and some, a lot of the work that you and I did together, just the tools and the trade craft in order to sort of get that corner turned so they can continue to scale.

So while the clients are different and the verticals are quite different, that's one of the delights of, I'm not just in the online coaching space. I have, eCommerce folks, I have services, but you know, items as well and just a blend they're worldwide, Singapore, cutter in the Middle East, you know, everywhere.

And but I still feel like what I do is very similar and very same, but different in a way. So I enjoy it.

Nancy: Yeah. I love it. I'm so happy for you. The name of this podcast is Your Permission Prescription. So I'm curious what you would like to invite the listener to give themselves permission for.

Karen: I think I would like to invite them. So I think I'm going to draw from my personal, not the advice that I give professionally, but from my personal experience, and especially my personal experience of the last couple years where I finally did put boundaries in place. And change my business model in order to support those boundaries.

And then I, , I happen to like work really hard and have 18 months pass, and then I saw success. But I would like to invite folks to do that earlier in their business. To really be brave. And even when it feels scary, especially scary financially to not, to not be every answer to every question that your client could ever ask you, but to specialize to niche and to put those boundaries up about what turns you on to provide in the marketplace.

I invite us all to double down on that because there's enough of us out there. And if we all, if we all sit in our genius stones, can you imagine like what a great vibrant community and you know, world this could be. If we were all just. Happier and, and really understanding what it is we're here to do in the world and doing just that.

Nancy: I love this so much, Karen. Thank you. Gosh, it's been such a joy to talk to today. Where can the listeners find you and follow you?

Karen: Yeah, so I am active on Instagram and that's Karen dot Sergeant. And I'm also inviting you to come to my website, which is Karensergeant.com.

Nancy: Thank you. I'm really so happy for everything that you're up to.

Karen: Thank you. This was so fun.

Nancy: Yay. Thanks for being here. And for everyone listening, I'll be back again next week.

Thanks so much for listening to today's episode. If you loved what you heard, I'd be so grateful. If you'd leave a review and share your experience. Even better follow this podcast. So you never miss a new episode. And if you'd like some extra support or guidance, head over to my Transform Together, Facebook group for an engaged community where you can speak your truth, receive inspiration and ask for help as you navigate life's journey or visit my website, Nancylevin.com.

Where you can find resources to help guide your path to reclaiming. What's truly important to you. Thanks again for joining me.