

MANAGING YOUR PRACTICE: A DIMENSIONAL PODCAST SERIES

System & Soul: Why Your Practice Needs Both to Thrive

Catherine Williams: Hi everyone. Thank you for joining us today. You know, when I think about what we're going to talk through during our time with this podcast, it really comes down to a question that I'm often faced with that I am often asked in my work with advisors around the world, and that is what does it really take to ultimately create a healthy, growing, vibrant organization.

Of course, you need to have clients, you need to have revenue, you need to have hopefully great people over time. But the one characteristic that I see pretty much without fail, with so many of the firms we work with is in this area of purpose and having not just the systems in place, but really understanding and being motivated by why you're there each day, the clients you most want to serve, the people you most want to work with.

I am looking forward to digging into some of that today and to really help lead that conversation it's my pleasure to introduce Benj Miller, who's the chief architect, co-founder and coach of System & Soul. Benj, thanks for being with us today.

Benj Miller: My pleasure. Super excited to be here.

Catherine Williams: You know, as I was preparing for our time today, a quote that I heard quite some time ago by Herb Kelleher, who is the founder of Southwest Airlines, came to mind. And this is one that I imagine you are very familiar with. But he says, "Leading an organization is as much about soul as it is about systems. Effective leadership finds its source and understanding."

And that's really, I think, where we're going to spend our time today, if that's all right with you.

Benj Miller: For sure. That's that is one little corner of what we do, but it's the one that I love to camp out in the most.

Catherine Williams: And so with that, I want to start by helping our audience understand a little bit about you, your background. System & Soul we're going to spend a lot of time talking about today but kind of how you got to the place of creating co-founding the System & Soul organization. So with that, tell me a little bit about your background and sort of what led to the creation of System & Soul.

Benj Miller: In my very young youth, I worked for an agency here in Atlanta, creative agency, and about two years into that position, I was a creative director working directly for the CEO. And I found myself having an "I quit, you're fired" conversation which set me out on a path to really just become I decided that I could go freelance, right?

Young, creative, just go freelance. And my greatest ambition at that time was to be able to replace my salary and have the freedom to work on my own. And I found that that was too low of a bar because I, I kept growing and growing and needing help and needing help. And a few years later, I realized I had an agency, and that went pretty well.

And we ended up at one year, we grew 300%, and I got way out over my skis. I had no idea what I was doing, Catherine. And so I realized I had three options. I could learn what it looked like to run a business. I could go back and just be, you know, two or three people, like, take the whole thing down and be like, everybody go away. Clients go away. I'm going to scale.

Catherine Williams: Yup.

Benj Miller: Right scale it way back. Or I could just fold it up and go get a job like a normal person. And that definitely wasn't for me. And scaling it back didn't sound like fun. So I started reading every book I could. I got in a peer group, a coach, and I absolutely fell in love with both the art and the science of business building.

And from there, I ended up starting over eight other companies, eight other companies over the course of the next 10 years and absolutely thrived in that environment. In those agency days, I was a very soulful leader. I really cared a lot about my people. I cared about our culture. I cared about the identity of the organization. But I created a lot of chaos in my wake because I didn't have any appreciation for the systems that could actually help me replicate those, make those scalable, make those consistent.

And so all my great ideas were more like riding a roller coaster, like we were high for a minute, and then we'd go do something else and meander around, and we might come back tomorrow or next week or next month. Depends on my energy, right? And so it wasn't until I really appreciated it and a friend of mine introduced me to the systems side of running a business that I was able to kind of accelerate what I was able to do by not trying to be something I wasn't, but using other people to manage the systems that could accelerate what I was trying to do.

Catherine Williams: So as we think about this really this intersection that you're describing, thinking about the soul of the business, the ideas that you would have, the passion that you would show up with each day, really wanting to motivate others around you to feel the same way, think the same way. But then recognizing that you need to get purposeful about the systems that need to kick in around certain ideas. Otherwise, is it not too bold to say that there's a real fatigue that can set in? As you said, there is a lot of chaos that can show up in the business when you've got lots of great ideas, but not an appetite or a process for developing the systems around them.

Benj Miller: Oh yeah. Yeah. I would be frustrated by my organization and I would frustrate my organization so the way that I see it now is that the system that we have in our business can make the soul side true. If we just say all these things about our soul side but we don't have the systems to make those things true, it all falls apart.

And on the other hand, the soul side makes the systems matter because we don't need a perfectly run organization with no soul. We have plenty of those.

Catherine Williams: How do you define soul?

Benj Miller: Oh, yeah. I mean, it's impossible to define, but to me, it's all wrapped up in the ethos of the organization, who they are, the identity of the organization. The culture and the people. And going back to your Herb quote, you know, we believe that leadership in an organization is 80% leading yourself well. And if we can learn to lead ourselves well, then we can talk about how do we lead other people and how do we create leaders.

But if we're leading ourselves well, then we're setting an example that other people will follow and will naturally mimic in the organization. We're setting a standard for what it looks like to lead. So we spend most of our time in the category of leadership, really focused around how do we lead ourselves well instead of focused on leading other people.

Catherine Williams: So we may have some folks listening to this podcast who think, you know what, I got this. In fact I'm not even sure I'll listen to this entire podcast. My company's got soul, we've got systems. I show up each day. I am the idea man or woman. The ideal leader. And I've got a great team of people that figure out the, you know, the nuts and bolts, and it seems to work really well.

What might be some indicators that it's actually not working as well as someone might believe that it is in their business or that maybe their ideas are not really getting, starting with the soul the organization first?

Benj Miller: Yeah, that's a great question, and I'll do you one better because there's a bunch of indicators. So we actually made a diagnostic and it's free. So you can go jump on there, you can take it, you can have your team take it so that there's no chances of you self biasing the outcome there. But it's at S2Diagnostic.com

We have six elements of our model and so it will walk you through those and give you a score in each one and then an aggregate because of the six, it's a little too strong to say they're half system and half soul, but it's almost half system and half soul in our model, there's just a lot of interplay between the two, how they elevate each other.

So you'll get your score and most people end up stronger on one side of the model than the other.

Catherine Williams: So let's spend a little bit of time talking about the system side then. And then we'll kind of circle back over here with a 1-2 combination if you will.

Benj Miller: Sure.

Catherine Williams: When you think about systems, when you think about what's necessary in a business and whether you're a small maybe even a sole practitioner business or a firm that's managing has, you know, 50, 60, 70 employees. Systems can mean a lot of different things and can be obviously evolutionary depending on where your business is at, the lifecycle of that business.

But as you think about key systems or key areas of the business where systems almost from day one will be likely to be required. Anything that comes to mind when I ask you that?

Benj Miller: There's a couple obvious ones, like documenting your core processes in your business and having a scoreboard. We talk about scoreboards over scorecards because scorecards tell us what happened. Scoreboards answer the question are we winning at an individual team and a company level? So those are kind of the obvious ones. I'll tell you the most under-utilized tool that we have.

And everybody's going to roll their eyes when I say this, but if you follow me for the next 60 seconds, I bet you fail this test. So the org chart, we all know what an org chart is. Is yours up to date? Have we clearly defined what it means to sit in each of those boxes? And what I mean by that is have we given a mission to that seat to clearly say, Hey, this is why this seat exists within this organization, right?

So we're tying what you're doing to the purpose of the organization, and then we're going to say, Hey, this is how we're going to measure your effectiveness in this role. You know, a couple of KPIs. And then there's

the roles that, you know, drive those KPIs. And most people, you know, they've got maybe this in their head, but it's not documented.

It's not clear. One of the things that we you know, when we're when we're building that out, anybody that manages people, we use the acronym CAR. So it's their job to drive the CAR for their people. And that acronym is Clarity, Autonomy and Results. So one of the main reasons that most people fail to hold people accountable is they feel guilty that they haven't done their job creating the clarity they need to for the people that work for them.

So we start with clarity. If we give them clarity, we can set them out on their own. We don't need to micromanage them because we can follow back up and have real conversations about the results, tied to those metrics, tied to the responsibilities they have. It's all clear. And we can have, you know, a non-emotional conversation about how they're doing in the role they're in, which creates a great coaching opportunity to coach our people up and let them know what's expected at their level and to get to the next level. So that that would be the absolute number one.

And then as a team, a weekly meeting with an agenda with three purposes, stay connected as a team. We are big on setting 90 day, we call them quarterly objectives. So these are the things that we are doing to improve the business. It's not, you know, hit my sales quota because that's my job, right? It's the bigger thing that's going to make our job easier next quarter than this quarter because we did them this quarter.

We're going to thank ourselves next quarter, right for doing these things. So we're going to keep connected to the team, keep those big objectives on track and then become world class problem solvers as a team. We call them opportunities. So as the week goes up, you see all these different opportunities, add them to a list, learn how to prioritize them, learn how to solve them as a team.

We actually want to encourage that, bring those opportunities because it might look like an issue. But on the other side of it, there's an opportunity for this organization.

Catherine Williams: And I love what you said about the org chart and so often I find myself in a conversation with an advisory business that has created has morphed positions around the individuals that are sitting in those positions. And it's kind of gotten away from them. And, you know, let's be honest, these last couple of years, I mean, I've had a number of advisors say to me, I feel a little bit like my people are holding me a little bit hostage.

Right? Nobody wants to come back to the office anymore or they you know, there's been a new day around compensation or flexibility. And so how do I continue to, you know, adhere to the values and grow my business the way that I want when I when I feel like I'm continually just sort of giving in. So when I talk about for me, when I talk about the people who sit in those roles and role clarity, it's not just what they're doing, but also how you expect them to do it, right?

And get and get it done. But doing it in the way that is first and foremost answers the question, if this role is truly optimized, if it's really functioning at its highest level, what does that look like for the business? And then as you start putting people in those roles, you figure that out. So I love what you said about the org.

I think that that is an area where even the most seasoned firms are something that they tend to kind of set aside or they only go to when there's a big crisis or a big change or something that causes them to take a look at it.

Benj Miller: So can I pick on financial services for a minute?

Catherine Williams: Absolutely. We're tough. We can take it.

Benj Miller: Here's two things that I see come up. And if you're not this, forgive me and congratulate yourselves. Pat yourselves on the back. Here's two ways that I see financial organizations hold themselves back. One is and these are these are correlated. But the first is if you have a senior leadership team of your organization that still has a book of business, you have to ask yourself what their priority is, how much time are you expecting them to do what?

Because some of those are the most senior people in the organizations with the most senior books, with the most senior relationships. And we're asking them to lead the organization to the next level in their spare time. That's the reality of what's happening. And that's, you know, you see that show up a lot with frustration about not moving the speed that we want to move as an organization.

And that's part of it. The second part of this highly correlated is, I see this underlying subconscious belief that if you haven't managed a book of business, you have no idea how our business works and therefore can't lead it. And I would argue that business is business. And if you find somebody that's exceptional at leading in business, they can step in about anywhere and kick a lot of butt. What do you think? Does that ring true?

Catherine Williams: It absolutely does. And I'm the first to say that depending on the size of your business and what your growth aspirations are, where you are in your business cycle, you may or may not be ready yet to go out and hire, for example, that dedicated C-suite level so that you can be freed up to work with clients or vice versa.

But I think your point is still absolutely valid and one where we're often encouraging advisors when I'm talking to a firm owner that's wearing multiple hats, get purposeful about having a job description to each of those hats because that will help create discipline to peel off and get much more focused over time when the business demands it.

We spend a lot of time in our Global Advisors study looking at capacity metrics and profitability metrics and all these things. And we love metrics, right? I mean, you know, certainly it's in our DNA here at Dimensional but a lot of it comes down to the willingness to be very candid about where you're spending your time on the business.

And if you're looking to grow, if you're looking to add people, systems and technology you can't do that at 3:00 on a Friday afternoon. You've got to allocate time. So this particularly is coming home to roost with so many of the firms we talk to that are interested in growing through mergers and acquisition and this idea of, you know, kind of getting your house in order first before you start pursuing some of that kind of growth.

Benj Miller: And using an operating framework like System & Soul when you're talking about mergers, acquisition is beautiful because you have context for everything. You have a place for everything. Even if there's holes and we know it's missing, it's very clear that it's missing. And we know that, you know, over the next whatever it is, transition period, six months, a year or two years.

These are the holes that we have to fill. And these are the ones that aren't aligned between the two organizations. And we've got to figure that out. It just creates like this. You know, it's easy to look at all the metrics and put them together, right? And say, hey, this is what our new balance sheet would look like.

This is what the new P&L would look like. This is where the redundant overhead would look like. But what are the systems? And then the soul and how are those compatible? One of the things that we talk about on

the system side is pace. Well, what happens if you take an organization that's used to moving, you know, 100 miles an hour and they're hungry, so they're going to gobble up some smaller firms?

Well, these firms are used to going about 40 miles per hour, right? So pace is huge and can create a lot of tension because they may want the same thing to go in the same direction. But the speeds just aren't aligned either.

Catherine Williams: That's such a great point. So with that, the System & Soul framework is comprised of six key elements that, you know, you all have identified as being really the backbone to productivity, well-organized organizations. Can you talk a little bit about those six elements? I want to be very thoughtful about your intellectual capital on this, but I think giving that framework I think would be really interesting for our audience, if you're willing.

Benj Miller: There's nothing amazingly special about our IP. We're more curators than creators. I love this stuff. So there's a lot of credit due a lot of other places in a lot of this. I do think that we've curated something very special, but I would not hoard it to myself by any measure. So we've talked about a lot of these already just in passing.

But the first one is design, and that's where we talk about the structure in the org chart. The processes and lastly, bets, which are thinking about how we make decisions and bets. Which is really easy for the founder of an organization because they're used to this. This is a muscle they've created when they started their own firm, hung their own shingle.

They made a huge bet when they brought on their first producer, their first non-producer, huge bets, right? So they're used to thinking about this. But how do we teach an organization that when you have a fixed limited number of resources there's an opportunity cost for every bet and the risk and reward better be in a good relation for that bet?

So we help the organization think in bets. The second one's cadence, which we just talked about, which is the pace, making sure everybody's going the same speed. We do that with our quarterly objectives, the weekly meetings and then weekly small micro touchpoints between our managers and our managees to make sure that they're in a good mental space, they're in a good workspace, they're not in a red zone.

You know, all the conversations that we know we should have, we kind of systematize those to make sure they actually happen. Then the scores live on the systems side, so company, the teams and individual just answer the question, am I winning? Are we going to win at the end of the game? Are we on pace to win at the end of the game?

On the side that's a little more soul heavy, we talk about the destination. So in the destination, obviously there's a where and when, but the most important thing is actually why? Why does this matter who does this impact? And that's where the story gets created that brings other people into the story and allows them to play a role, whether it's a customer or an employee, a shareholder, a prospect.

We want to create a story for them that they find themselves in. And so there's something about why we do what we do that allows for that story to be created. The second thing is the ethos of the organization. So we break that down into the identity giving your organization just one simple sentence that sets the identity. It's like it's like a flag, a banner above us that this is our marching.

We all resonate with the identity of this organization. We are huge fans and we leverage Jim Collins hedgehog concept, which really just answers three questions and creates an amazing decision making filter.

What are we really, really good at? What are we really passionate about, and what is the driver of our economic engine? And then we get into people, the last element is people.

And so we are intentional about the culture that we create. I'm sorry, values. I missed values and ethos. We can talk about that for a whole podcast, but values are the foundation of the whole organization. So then we get to people and we talk about culture. So we've got an awesome exercise that's super simple that helps you set the intention for what you want your culture to be. World class problem solvers and then leadership all fit into this bucket of people and our objective there is just that we have humans that are growing and healthy and that's it. That's what we want in our organization.

Catherine Williams: Where do you find companies tend to struggle across those six elements? Is there a particular area where you see them get a little stuck?

Benj Miller: Well, as the leader goes, so goes the organization, right? Yeah. Said differently, in the words of my longtime business coach. The issues in the business are a reflection of the heart of the leader. So most leaders skew soul or system and they really just need that other side to come in and put them together. In all my years of working with organizations, I've only ever walked in one organization where I felt like, Oh my goodness, they don't have system or soul and I'm not sure they can get there on the soul side. And those guys were on a short timeline to a quick exit, and that's all that mattered. Otherwise, most leaders tend to be really strong on one, either the system or the soul, and maybe more specifically in some different areas. But it generally is somebody who's highly charismatic, cares a lot about either their market or their people, you know, very people centric driven, or you've got the guy that thinks that they have the better mousetrap and they're going to hyper focus on the product side or the system side of their business.

Catherine Williams: When we think about systems, I think a word that often comes to mind is workflows, which I wouldn't say it's an overused word, but it's one that it's like, what do we what are we really trying to figure out here? And I think, you know, this idea almost to your prior comment here that if we just build some really great mousetrap, like everything will be fine, everything will connect everything will talk to each other. But with that said, when you, we'll go in the weeds for just a bit here, but when you do think about, you know, workflow processes, what do you consider to be the key tenets to a true workflow process and where you've seen them excel or propel an organization forward? What's in play there?

Benj Miller: Well, the minute we say that it has like a paralyzing effect because nobody wants to think about it, nobody wants to deal with it. It is a big old, you know, issue. But on the other side of it is a huge opportunity. And the biggest opportunity is that if we can figure out the way that we do this right now, one of the best ways to become innovative as an organization is actually to innovate from a baseline.

So every scientist ever has known this, right? You need a control and a variable. But if all we have is variables, then we get really bad data, right? We have no idea what really works what's better because we all we have variables. So I try and make this a little bit fun, as fun as process can be, but get the people who actually do the process, get them in a room with a big whiteboard or a big sheet of paper and just create sticky notes and put them on the board, say, what do we do first?

Then what has to happen? Then what's happened? Then what's happened? Then you can go get a different color sticky and say, All right, where do we breakdown? Where do the problems happen? And then we put those colored stickies up and now we have an opportunities list because if we can solve those, what if I mean, what are we doing doubling and tripling the speed of this thing if we're just spending a few minutes talking through it?

Most organizations don't actually take the time to ever talk through what they're actually doing. But this is so simple and it becomes fun. It actually becomes energizing. And once you have that documented, now we can on board somebody who actually knows our way of doing it. Now, we can innovate from the process and try new things. Now, we can.

You know, it's the repeated success on the other side of it just shows up because nobody's improving their way through our workflow.

Catherine Williams: And it's a way to create scale in particularly for the advisory business, where at times, you know, we're very much catering to the individual client's needs, the things that they're asking for in that moment in time. And yet there is absolutely opportunity to systematize and add scale to your business in a way that's washable and repeatable.

Benj Miller: So yeah, and in the relationship business, it's really hard, right? The instinct is that we need to cater to the person because that is the value that we bring them. And the reality is that your high net worth individual wants to be told no, they want to be told no, this is how we do it so that we get the results that you came to us for.

And a little bit of pushback, it's actually leading them instead of just catering to them.

Catherine Williams: So in your work with business owners tackling System & Soul over the course of, you know, a year or two years, when you look at the firms that you've worked with that have really embraced these six elements, have come through, had that breakthrough, right? Yeah. There's a mastery now in place. What does that business look like?

What do you see if you were to walk through the doors of that business that may actually not be totally obvious to anyone else walking through the door?

Benj Miller: Yeah. The feel is this strong intensity matched with this fun energy because there's no wasted energy. So it all is so intense because, you know, whatever you put in, you're going to get out on the other side. There's just so much focus and clarity about what we're doing and how to do it that it allows for this fun, fun might not be the right word, but it's just energy. It's electric, right? And you can feel it. But I'll tell you, what actually creates that is the really boring blocking and tackling stuff. You know, it's the stuff that we all know we should do as a leader. But the tyranny of the urgent and our inability to be attentive to those around us just kill us.

Catherine Williams: Many times I talk to business owners that struggle with taking time. We talked about this earlier around actually allocating time for endeavors that don't feel revenue generating right away. That don't feel as if there's going to be an immediate output. And it's not a comment. It's purely the function in my experience of there's only so much you can do each day as a business owner.

And as you said, you're replying to clients, you're responding to clients or replying to that next new client and the rest of the day sort of gets gobbled up. And so it's an ongoing challenge for so many business owners.

Benj Miller: Yeah. And then we're back to are you leading your book of business or are you leading your team? Right, right. Because your team is a force multiplier and even getting the clarity, I would encourage that leader getting clarity on the multiple roles that you're actually fulfilling for the organization. I'm not dictating which ones you should take off. I'm just saying if you want as an organization to scale past where you are right now, you're going to have to be intentional and start to take those off.

And the ones that you take off, there's probably people out there that can actually do the job better than you.

Catherine Williams: And we certainly find that organizations who take the time to develop their systems and processes, document them. They become of course, a path for consistent training for all of their people, it becomes a path for a consistent client experience. It actually then informs when and what your next hire looks like. That's a better and a more informed decision.

You're not just reacting to I need another operations person, I need another client service or more expensively, I need another advisor. And the reality is technology and systems could actually create scale in areas of your business that could better inform who you may need to go out and hire as your next hire.

Benj Miller: I think that's where the energy and focus comes from. When you get there to the point that you're talking about, it's so fun because you're almost earning these rewards that have their own rewards. Like, hey, when we get to this certain place, we get this new hire which is going to create new capacity for new clients, for new revenue, for new whatever, which is going to get us to the next, we call them hiring gates. I don't know why I call them that, but they're gates. And when you get to the gate, you you know, you have a plan that says, when we get to this mark, this is what we do. It's just a driver that creates the energy to get through that gate because you know you're going to unlock a new opportunity for the business.

Catherine Williams: I was just speaking with an advisor out of Scotland this morning, and they are wrestling with this very question. They suspect they need to hire, but they'd really like to make sure that they've got their systems and technology at least as buttoned up as they possibly can. And that will inform whether, you know, that the skills, the background and really the day to day responsibilities that this hire has, so you know, the firm is not questioning whether they need to hire, but they'd really like to make the right hire and by taking the time to pay attention their system.

So I could have used you on that phone call this morning.

Benj Miller: I don't know. I don't know. You guys have a lot of technology in your space that I don't understand.

Catherine Williams: Well, it's an area of our Global Advisors Study that we probably made second on the human capital side, second only to compensation. We spend a lot of time on advisors participate in that study for many of them for the express purpose of being able to see when I look at my peers, how many people do they have in their business, when are they hiring?

What do their capacity metrics look like that they start thinking about hiring, things like that. So this is a this is a very timely, timely conversation. I'd love to pivot just a little bit and as I was going through your book, *The Clarity Field Guide*, which I highly recommend, and I think that everyone should grab a copy and even as you were saying, you know, take themselves through it, but also take your team through portions of this for sure.

And one of the areas that I thought was really interesting is this idea of sort of the creator cycle and what is your current season around, you know, where you're sitting. And I'd love to start with, what does that look like for you? And as you think about, you know, planning, executing the doldrums, which I love, is that's a valid cycle and cocooning.

You know, how has that shown up for you? And if I'm a business owner listening to this, why might that be an important exercise for me to go through?

Benj Miller: Yeah, thanks for asking about that. I stumbled into this. I'm from the Midwest. I literally grew up on three acres surrounded by, you know, every two years it'd be corn and then soy and so I would watch, you know, it grow, it basically die on the vine, get harvested, sit empty. So I had this metaphor in my head, and I had seen it at work, but I didn't realize how much humans were wired like the rest of nature.

And I was having a conversation with my coach once, and I was frankly, I'm just depressed, you know, and I wasn't only depressed. I was frustrated. That I was back here at the same spot feeling depressed. And in all of his wisdom, he was like, well, you're just in the doldrums. I'm like, OK, well, how's that different than being depressed?

He's like, you're not depressed. You're just in a season. It's a season. That's what it is. And it's fall. Everything's dying whether you have a great harvest or a poor harvest, it leads to the same place, which is the doldrums. And then you go into winter, which is cocooning. You know, we all want to cuddle up by the fire and kind of hibernate.

But then comes spring. In spring, we wake up and we have almost infinite energy, and we plan 17 new initiatives, and we say yes to every social invite. And then summer comes and summer is all about executing. So we made all these plans in the spring. Summer we execute, we go, go, go. We get things done, our heads down, we're checking things off our list, and then all of a sudden we wake up and we're back in the doldrums.

And so one of the key learnings from that was just to not fight it, to understand where you are in the cycle and almost like taekwondo, you use that force against itself, right. And so instead of fighting it, you understand that there are certain things we should focus on in each of those seasons instead of thinking we're Superman in all of them.

And so some of the things you would do when you're in doldrums, like don't try and make big decisions, don't try and plan your life. You know, don't try and think that you're in the wrong job, career, whatever because you're just in a mood and you need to just love on yourself, get through the mood and then you can, you know, when you're in spring and you have a lot of energy if that season's telling you you're in the wrong place, then you need to dig into that.

Right? And so just knowing how to live in the cycle that we were created to live in.

Catherine Williams: Well and I would offer as a business owner, as a business leader, recognizing that your people will go through those same cycles and they may be at different times. You might be in planning and someone else is in cocooning. And sometimes that can be a real problem. But hopefully most of the time it means there's an opportunity for everyone to evolve and contribute to the business in a way that, you know, makes long term sense.

And definitely for me, I you know, you have a quote at the beginning of your book by the former Secretary of Defense James Mattis, and he talks it's about solitude. And I think, you know, oftentimes as business owners, there's so much noise out there. We have our people, our clients, the media, goodness knows the environment we've all been operating in, even these last couple of years.

And I think finding some solitude to think about that and quite honestly, going through the Clarity Guide probably sounds like a good exercise too.

Benj Miller: You know, nobody argues that the most important thing we can do as leaders is take time to think. But we don't prioritize it.

Catherine Williams: We don't. But when I talk with leaders, many of them have been on this podcast, so I'm not going to name any names, but you will know some of the names from the podcasts. So many of the conferences we've done where we've had just real great visionary leaders that have contributed their thought leadership around this running a business.

I can tell you most of them find some time to find solitude, to be quiet. They give permission to their team at times to be quiet. They're there as purposeful and as disciplined about that as they are putting their pedal on the gas, getting that next client, growing that business, making sure that they're, you know, they're thriving. And that is a muscle that gets built over time.

I don't know many people that walk to it naturally.

Benj Miller: Well, we glorify if we even take it into the athletic realm, you know, of high, high production high capacity people. We glorify how they grind. But, you know, Michael Phelps slept like 14 hours a day. LeBron James sleeps, even if you're going to go hard, you better prioritize some recovery.

Catherine Williams: So what would you offer for someone listening today that would very much like to think more purposefully about systems and the soul and how they work together, where they intersect if you will, in the business. What might be a couple of key initial questions that they could ask themselves or ask their organization to begin thinking about where there's some opportunity for them?

Benj Miller: Yeah, well, the easiest thing is to take the diagnostic. I'll go back to that because the questions are in there. And even if you never looked at the results, going through that's going to spark some things. When I first took some of these things seriously, I had a moment of like, I know these things, but I don't do them.

And so what's it going to take for me to actually do this as a leader? And that's a big deal because there's nothing I don't know that I have anything to teach anybody that's brand new, right? It's just like maybe some helpful tips on how we actually do them and make sure that that we create a cadence to that and it doesn't drop off, that all of our great initiatives lose steam if we're not really strategic about how we go about it. So the diagnostic is one.

We've got a ton of resources for free on our website. We've got a weekly meeting agenda and the list goes on and on our website, systemandsoul.com, has a ton of free downloads. I think you'll have to pay by giving us your email. We don't spam people, so it's all helpful. Good stuff.

Catherine Williams: That's really fantastic. And you've got a great podcast as well to where you're giving some, I would say some very actionable tips and ways to sort of inspire business owners and companies to think about this. So that podcast is another resource as well too.

Benj Miller: Yeah, super fun.

Catherine Williams: Benj, I want to thank you for your time. You know, here in practice management, we sit all day long in this balance between the hard numbers of business, the hard activity of business, and then also the area of people and why we do this each day. And what's really driving us at the end of the day. And so thank you for straddling that with me today here as well.

It can feel a little squishy at times, but I think, you know, certainly you have given some great construct to thinking about systems, how it informs the soul of your organization, who you most want to work with, the kinds of people that you want to have by your side as you're building out your own business. And so I really appreciate you taking the time to share that with our audience today.

Benj Miller: My pleasure.

Catherine Williams: I definitely want to encourage, if you're looking for more information about Dimensional and how we work with advisors and investment professionals, you can check us out at Dimensional.com. And with that, we'll see you again soon.

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