



YOUR TEAM SUCCESS PODCAST
Teamwork Triad In Real Life,
with Chad Willardson

Shannon Waller: You've heard me talk about the Teamwork Triad. Are you curious to see how it plays out in real life? Stay tuned for my fascinating and wide-ranging conversation with Chad Willardson. Hi, Shannon Waller here, and welcome to Team Success. Today, I am particularly excited to talk to my good friend and client, Chad Willardson. Chad, thank you very much for joining me. And one of the reasons when we were talking, as we often do in Free Zone workshops, et cetera, is about teamwork. And you have been really excited by the idea of what I call the Teamwork Triad, which is really that visionary person, that person who's then going to take your ideas. We call them an Innovation Manager, a coach, and kind of make them real. And then also someone who's a focus manager or a Strategic Assistant who's going to really make sure all of those things get across the finish line and get done. And you have put together a team. You've corresponded a lot with myself and with Julia about how to really create that Unique Ability dream team for you as a multi-talented, multi-ambitious entrepreneur with all of the different things that you're up to. So I will have you just say a little bit more about your background, but I also want to mention that you are a very successful author as well as podcaster. And there's so much to talk about for your background, but you started off with Stress-Free Money. Raise your hand if that's of interest as you're listening. The next one is Smart Not Spoiled for kids about money intelligence, financial literacy for kids, which is huge, which also includes parents, beyond the money for really wealthy entrepreneurs, and your new one coming out. Actually, can you just mention the new one you're coming out with? It sounds amazing.

Chad Willardson: Yeah, I'm excited, thank you. It's called Fit for Wealth. Fit for Wealth, and it's the seven breakthrough strategies to create elite health and abundant wealth. So that's a topic I'm really excited about.

Shannon Waller: And you live that.

Chad Willardson: I'm doing my best. I'm doing my best.

Shannon Waller: Hour and a half workout this morning. That's right.

Chad Willardson: That's right. I'm ready. Ready to go.

Shannon Waller: Definitely qualifies. I love it. So Chad, as we jump into the thing about teamwork, give people a little bit more of a sense of you, your business, who you serve, your family, just a little bit more background so people can understand who Chad is.

Chad Willardson: Sure, I'll start with family. Well, first of all, as you said, when we got on the podcast here, I'm a very Southern Californian guy, born and raised in Southern California. My wife and I have been married 22 years now. We've got five kids, ages 8 to almost 19. So we're a very active family, very much involved in sports and church and all things travel. But my professional background, I started straight out of college working at Merrill Lynch Wealth Management. Spent nine years there, decided I was not fit to be in any kind of a big corporation or system. So I, like Jerry Maguire, I took my box of stuff and my assistant and I walked out on a



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Monday morning and started all over and started Pacific Capital in 2011. I actually left on 11, 11, 11 for a little superstitious fun.

Shannon Waller: That's fun.

Chad Willardson: Kind of cool. So we are a fiduciary outsourced family office serving entrepreneurs with at least \$10 million to invest. Very specific, niche group all over the world, but I love the people we work with and I really understand and relate to them. So this whole triad idea, I think you called it the Unique Ability super team. Is that what you called it?

Shannon Waller: Possibly.

Chad Willardson: I mean, that was the coolest name I've ever heard for it. But Shannon, so as you just started talking to me about building my EA team, as I was looking to make a change in EAs last year, this idea just really resonated with me. And the part of the idea that really got me excited was creating a team outside of my business. That's like my team that only works for me and looks at all the business ventures I'm involved in and is more separated. And how do I have two EAs instead of one? I mean, this, these were all questions that I had to rely on you guys for, and thank goodness, you know what you're talking about. Cause I would never be where I'm at today if we didn't have those conversations.

Shannon Waller: Oh, that's exciting. Well, we'll dive into the extra freedom that that team gives you. But let's talk about it because a lot of people are very familiar with EOS. Strategic Coach runs on EOS, huge fan. But one of the things that I saw in terms of the need for entrepreneurs is they got so stuck between their ideas and things that they want to have happen and their ambitions and their goals, but they didn't have a team around them in the company. Often the first person the entrepreneur would hire, the owner would hire, is not someone to support them but someone to support finance or someone to support the team and hiring or someone to support customer service, sales, all the things except for them and they end up more and more, to use a technical term, squished in terms of their creativity and their ambition. They would have these bigger ambitions, but the team is so full. And then, in fact, you end up taking things over yourself. So one, and this came about a while ago when we were talking about in Strategic Coach, the whole idea of, you know, the make it up person. Well, actually, I'm the one who coined the term, but Dan was describing the idea of the idea person and then the, what we then called a project manager. Turns out if you go to hire that in the marketplace, you actually go, well, we call a Process Manager. So we have changed the name, but now we call it Innovation Manager. And then you pass it off to the person who's going to make it really systematic. And that's your Focus or Process Manager. And then so what came to me one day, I'm like, oh, make it up, make it real, make it recur. And that has since stuck, but that whole, have an idea of a triad, and when the entrepreneur has that for him or herself, and you know, that isn't necessarily tied just to the aims of that one particular business, it goes with you, all of a sudden, all of this new freedom comes up that was not. Superpower.



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Chad Willardson: Yeah. Superpower. And Shannon, you just gave me the idea, when you say the entrepreneur is squished, the visionary is squished, here's what I ran into is, I'm the visionary, but I'm in the Free Zone group at Coach. I have ideas for collaboration and other things that are outside my business. But my primary brainstorming partner, if you will, was my integrator who's running that one specific large business. So it didn't make sense. Like, why am I talking through these ideas with someone who doesn't really have that same passion or idea or vision for these other collaborations that have nothing to do with this business, right? So it was like, I need to set up this super team on the outside and make sure all my businesses are Self-Managing and Self-Multiplying. But that super team of two incredible people working with me is just a game changer. It's freed up so much of my energy because I have brainstorming partners to talk through things with and to keep that energy high for new ideas.

Shannon Waller: Yeah. So I'm going to call this podcast Teamwork Triad in Real Life with Chad Willardson.

Chad Willardson: I like it. Teamwork Triad. I like it.

Shannon Waller: That's really what this is, although Superteam is even cooler. But it really is all of a sudden you getting leveraged, you getting freed up to do things that otherwise you were feeling getting squished or really frustrated with.

Chad Willardson: Bothered, yeah, bothered, a lot of bothered.

Shannon Waller: Bothered, yeah, your aspirations get smaller. Yes. And it's really frustrating when you create this really successful company, it's full of resources and people and ideas and cash flow, but it's not appropriate to take it for these new ideas. So actually funding your own team may seem kind of radical, but it's not a vanity project.

Chad Willardson: No.

Shannon Waller: These things turn into money, revenue, profit, all of the things.

Chad Willardson: Yeah, it's an investment, but it turns into real results, big time results, but it's an investment for sure.

Shannon Waller: So let's talk about your fabulous teammates, your other two people, which are Maddie and Oriya, right? Super stars. Yes. Okay. So tell me about them. Maddie was the first person to join this—

Chad Willardson: Yeah, here's a fun story as we look back. So I was hiring for a position within the company, Pacific Capital, in the summer of 2022. And even though we have job postings everywhere and we use recruiting services and this and that, I seem to get lucky and just find my people on LinkedIn. I'm very active on LinkedIn. So we will shoot direct messages on LinkedIn and just say, "Hey, here's a job posting. Based on your profile, you look like you might be interested and could be a great fit. Please let us know if you're interested." And I sent the



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direct message to Maddie back in June of 2022. And it was, “No, thanks. I’m not interested. I appreciate it, though. I’m very happy where I’m at.” We had another position open in October. Reached back out again. She’s like, “Nope, it’s not really a good time for me.” Basically wasn’t interested. And then like a month later, I was like, I’m looking for a new EA, and I thought, I mean, should I reach out or not? Probably not, because I was reaching out. She works at a very high net worth regional bank in Newport Beach, and I don’t think she has any aspirations to work as an EA type situation. She’s never done that before, right? So I sent a message, and I said, “You’re probably not interested, but you were so impressive in the phone conversation we had. But I’m looking for a personal EA to really help me get to the next level. I want to make a change.” And she’s like, “Who? I might be interested.” And I was like, wait a second. So it led to some interviews and I realized this is a very high quality, high caliber professional. And I would be very fortunate to have her on my team. So I hired Maddie just after Christmas 2022, but it started with a LinkedIn private message, right? Fast forward. I know we’re going to get to that, but funny enough, Oriya, as you mentioned, personal Strategic Assistant, started in June 2023. So just four months ago, three months ago, I also reached out to her via private message in October, September, when I was looking for that new EA, because she has almost 20 years of EA experience. And she said the same thing. “I’m not interested. Thanks though. Appreciate you reaching out. Reach back out again in April.” And she was like, actually, I might be interested, you know? And so we look back and we laugh about it. Cause I’m like, there was something I knew you two were supposed to be on my team. You guys just didn’t know it yet. But here we are.

Shannon Waller: And what I take from that is timing matters. Yeah. Right.

Chad Willardson: Yes, for both of them.

Shannon Waller: Right. And persistence, just not giving up. So did you just kind of have to like lumber along and just not be leveraged the way that you wanted to be while you were waiting?

Chad Willardson: Yes, because I was still working on finding the right people. But besides timing, I would say it’s when you find incredible people, get them on your team. You’ll figure it out. Like Maddie had no EA experience, but she was clearly an incredible, capable person. And she was so impressive that I’m like, she has to work with me like there’s no way around it. Like she’s such a great individual, very professional, very qualified, just you could tell she’s a superstar. So I was like, I got to find a place for her. She doesn’t want to work in the company. That’s fine. Let’s try this EA thing out. And then as we evolved, she showed a very keen interest in the business side, in the numbers, in the project management, the big projects, the big business collaborations. And it was like, hmm, she could take on a lot of bigger stuff. She could really manage some heavier lifting things in the next 10 years. What do I do to backfill where she’s not going to be able to do the personal EA work and my calendar and my marketing and stuff like that? And that’s when we leaned back and found Oriya.



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Shannon Waller: Interesting. Before we jump to how that all works, because I'm sure some people are like, whoa, this is a mind-blowing idea, which it kind of is, you had to do a couple of things to get Maddie. I mean, it was a big shift from what she'd been doing before. Yes. She'd been very well compensated, but you painted a picture of a vision that was really compelling for her. So can you talk about that? Because what does it take to, I mean, you said I'd be very fortunate to have someone of that high caliber on my team. What does it take to attract that person? What kind of compelling offer, to use Dean Jackson's term, do you need to make that would actually appeal to someone of that caliber?

Chad Willardson: The compelling offer really is the vision of what's possible and dialing it in to see what she really loved to do. I was like, what are you really excited about? What do you see yourself doing in five to 10 years? What did you love about your last job? What did you really dread about your last job? I was able to just pull all that out and say, "Man, I tell you what, the sky's the limit over here. Like I'm going to help you to be more of who you are and really dive into your Unique Ability." And by the way, neither of them were really familiar with Unique Ability, but both of them were caught in some Unique Ability, but a lot of things that they really didn't enjoy, but that was just part of the job. And so I said, What if you could have the total freedom and flexibility to just focus in on what you love and what you're great at? And as you get better and do more, you're going to be compensated more." So it was that vision of like, I'm not like a big corporation. I'm very entrepreneurial. There's going to be new, exciting things all the time. Do you want to get on the rocket ship or not? Like we're on a rocket ship going to the moon and I've got open seats right next to me. So I'm not going to make you sit in the back. You're going to sit right next to me. I need one or two people to start and let's go. And it was exciting enough for them to both eventually come over.

Shannon Waller: Well, I'm glad you said rocket ship, because I remember you having that conversation with me and sharing what you'd shared with Maddie. So I'm like, yes, that's really appealing to an ambitious, you know, yes, in a support role, but a very powerful support role.

Chad Willardson: Oh, very powerful. Yeah. Like these are not like receptionist level people. These are very high caliber, very qualified. Both Oriya and Maddie are professional, capable, very smart, very intelligent. They take a lot of my meetings that I normally would have taken. I mean, I trust them to take actual, I bought a big office building here in California. We're remodeling the whole place. It's going to be a massive project. We're turning this building into like the coolest coastal Pacific capital beach resort type feel as an office, just because I hate regular offices. So this is going to be really fun. And Maddie is meeting with the construction team, with the vendors, She's meeting with the builder, the designer, the architect, the brokers. Like I don't even go to those meetings. So I think too often we look low for support people. We look low for EAs. We look low and say, well, they just need to be able to schedule appointments and do things like that that are simple. But I think when you're building this Teamwork Triad, like you need to look high. You need to look at people who've done some sweet stuff and get them on your team and empower them to do big things.



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Shannon Waller: I mean, the idea of not working for a big company, not having to do things that they don't like and being on this big trajectory to somewhere exciting and being freed up to do what they're best at and compensated for it. I was actually thinking about this almost in the reverse. It's like in an entrepreneurial company, in my Team Success Handbook, I talked about having an entrepreneurial attitude. You have to take so much more ownership. Now, the corollary to that is you get to take that much more ownership, but if you're not willing to, I'm sorry, an entrepreneurial company is just not the right fit. And especially when it's just you, the entrepreneur, it's even more concentrated. If you think about it like that.

Chad Willardson: Very much so. Very much so.

Shannon Waller: So much opportunity for the ownership, but you have to be willing to step into that. So I think that's really key.

Chad Willardson: If you can't handle the G-force of the rocket ship taking off, it's going to be very apparent. You're going to be puking your guts out, right? You better be that kind of person who's like ready to rock and roll. And I'll say this, I don't know if Maddie's okay with me sharing this, but I'm going to share it anyways. Maddie, this is because I appreciate you. Maddie got a salary raise in less than two months. No one has ever, who's ever worked for me in the history of me being an entrepreneur, has ever received a salary raise in less than two months. I said, you've done such a great job. I feel guilty not doing this. And I think there are many opportunities for Maddie and Oriya to continue to increase in responsibility and compensation because like I said, they're right here with me building great things. And when results happen, entrepreneurs say, hey, let's reward you. Let's take this to the next level for you.

Shannon Waller: And so there's really an abundance mindset. And if you think about, I mean, just the meetings you don't have to be in. I mean, just think about, I don't want to calculate that, Chad, but an hour of your time and what that's worth. And then she's leveraging you and, you know, helping free you up to do that. That's well worth that investment. I want to touch back on something else you said about like aiming high when you go to hire people. And it's interesting. And we'll talk a little bit about profiles as we get into this, because you did all the profiles on both of them.

Chad Willardson: I did.

Shannon Waller: And then, you know, Julia, my sister, Julia and I would get texts or chats on their Facebook Messenger. OK, this is the person's Kolbe. What do you think? This is their PRINT.



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Chad Willardson: You guys give me invaluable advice. So I always have to send you a WhatsApp when I've got a question about hiring.

Shannon Waller: I know. I love it. People always say, you know, they talk about teams and team building and they're not happy and they're frustrated. I remember walking up to one client, his name's Eric, in the very first workshop. It was lunch the first day. Marilyn had brought me over and he was super frustrated. He said he had like scar tissue, mental scar tissue, emotional scar tissue from hiring wrong people. So I talked to him for a couple of minutes. I'm like, Eric, you have to hire people who are wicked smart. That was my really, again, technical term. And I said, because you're wicked smart. And if you don't hire someone who's wicked smart, and he also, from a PRINT standpoint, which is the need is to be perfect, correct, and right, does not suffer fools gladly. No, you need somebody who can deliver on that. And he kind of looked at me and went, oh, and it took him a few years, but now he's got a really, really phenomenal team. In fact, my old EA, who's brilliant, Nicole, actually has helped put that team together for him. And it's amazing. So I think my point here is that entrepreneurs don't often appreciate their own intelligence. I didn't. We profile for personality, we profile for Kolbe, but if those two things are a fit and the person's still not working out, there's only one thing left that's not sufficient, and it's mental horsepower.

Chad Willardson: Well, and that's something you taught me, Shannon, is because you said, as I was interviewing Maddie when I was up in Chicago, you said it sounds like she has a fast brain. Yep. And I was like, hmm. Yeah, that's right. Yeah. She has a fast brain. She picks up things and quickly figures it out and gets it done. It's not me explaining things three times over or it's not her having confusion and lots of extra emails. So like when you're hiring your support team that's directly with you, they need to be caliber people. This is you. They represent you as the entrepreneur, the visionary in the marketplace. So, what kind of people are going to represent you? What kind of people are going to be your brainstorming partners? You don't want to brainstorm with someone who isn't at your level. You want people who are very ambitious, very capable, and who are going places.

Shannon Waller: Yeah, and you're just hoping that they'll actually align their ship with yours. So my point is don't underestimate mental horsepower. It matters. Don't take your own for granted. I just assumed everyone was kind of the same.

Chad Willardson: I agree. I've done that too.

Shannon Waller: It's not true. I wish it was, but it's not true. And I was late to that party. We're using Wonderlic, although they're eliminating their paper and pencil test, which is too bad, and adding in other stuff to it, but we use Wonderlic for intelligence testing, but it makes a difference. And here's something funny, I remember hearing a stat years ago, that hiring an assistant in EA is only one different in terms of the desired number from attorney.



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Chad Willardson: Oh, interesting.

Shannon Waller: A really great EA needs to be smart.

Chad Willardson: Yes, for sure.

Shannon Waller: OK, good. All right. So let's dive into and you guys have done a lot of work on this, which impresses me to no end. You and they have done a lot of work to make this Teamwork Triad work. Right. It's conscious. No one's just bumbling around the dark. You guys talk about things, you divvy up the tasks. And as you talked about it, Maddie sort of gravitated towards more the business things. And maybe you can share some of what those are. I mean, offices, there's offices, there's planes. There's lots of things involved in jazz life. That's true. Yeah. And then you more recently hired Oriya to kind of handle some more of those day-to-day and personal things. Yeah. So can you sort of just outline a little bit more about how that division of labor works?

Chad Willardson: The easiest way to describe how I look at their division of labor is Maddie is my left brain and Oriya is my right brain. And that's it.

Shannon Waller: I've not heard that before. That's hysterical.

Chad Willardson: It's true, though. It's true. The right brain is the creative. It's the personal touch. It's just a little, you know, the whipped cream on the shake right there in the smoothie. That's probably a dumb example. I don't drink coffee, but it's just the right brain, creative stuff that's personal. And that's Oriya's specialty. Oriya loves it. She does a lot of the marketing. She helps me edit my newsletters. She works with my PR team. She does all of our travel planning, personal for me and my wife. She does the calendar, the day-to-day operation management. She does my appointments. She filters out what gets to me, what doesn't get to me. Does most of my emails. Maddie is my left brain.

Shannon Waller: Before we get to that, because you still are connected to Pacific Capital.

Chad Willardson: Oh, 100 percent. Yeah.

Shannon Waller: So how does that work with Oriya? Like if she's managing your calendar, there's then there's certain probably input she needs to work on it with people at Pacific Capital. So how does that coordinate?

Chad Willardson: Yeah. So the team reaches out to Oriya to see when I'm available to do Pacific Capital appointments or Pacific Capital business. So they basically go through her and she says, here are the Focus Days that Chad has available for those kind of meetings.



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Shannon Waller: Nice. See, this is all the little layers, I love it. So you have designated certain Focus Days and Focus Days is a Coach term. If anyone wants the definition, it's 80% of your average working day, spending your top three money-making activities, plus anything whatsoever to do with what we call your top 20, your farm club.

Chad Willardson: The easiest way to say it is Focus Days are the days I do surgery. If I'm a surgeon, those are my surgery days. And so for me, it's Tuesdays and Wednesdays. And so the Pacific Capital team knows that typically it's Tuesdays and Wednesdays I'll take the surgery, financial surgery business appointments. And so they will go through Oriya just to make sure I don't have anything personal or other business related on my calendar and Oriya will clear that.

Shannon Waller: Nice. Okay, good. Just to share, because if you don't mind, you and your wife just came back from a gorgeous trip to Iceland to celebrate your anniversary.

Chad Willardson: It was awesome. Iceland is amazing. I still can't believe the pictures are real, but they're real. It was awesome.

Shannon Waller: They look like postcards. It's weird. But did Oriya organize all of that?

Chad Willardson: Every last detail, yes. Coordinated it to Triplt, booked all things, checked us into the flights, checks us into the hotels, speaks with the hotels that can make sure we're taken care of. So yeah, all that, all the personal touch stuff.

Shannon Waller: First class experience, love it. Yes, yes. Now, the other thing is you are someone who loves parties. You love to create really fun, unique experiences for people. That's true. Is she your partner with that too?

Chad Willardson: Yes, yes. Oriya is the partner that would help plan those things. When it comes to dealing with vendors, if it's a big, big project thing, Maddie might step in. But as far as like planning the personal fun stuff that I love to host, that would definitely be Oriya.

Shannon Waller: Excellent. Now let's move over to Maddie because Maddie has turned into your right hand slash left brain.

Chad Willardson: Yes.

Shannon Waller: For all of those things. So what do you really lean on Maddie for?

Chad Willardson: Maddie is anything dealing with business vendors, I would call them. It's probably not a great term, but it's like my business relationships. If someone reaches out and says, hey, I want to talk to Chad about an investment opportunity that I think he'd be interested in, she'll take that meeting on my behalf. I own a lot of investment real estate. Maddie now works with our property management team. So a lot of the real estate's out of state. So she's even flown out of state to visit different properties and met with the team, talked about the cash flow, the P&Ls, discussed maintenance. She approves maintenance and all that stuff. So she



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deals with the stuff that's financial. She deals with my CPA team. So she'll talk through the tax stuff. She deals with our bookkeepers. She deals with the pilots and the jet management, which is a lot of work. It's a lot of work. And no disrespect to my last year, but it was too much for her to handle. And our primary pilot said that Maddie picked it up in like less than a month. The whole thing.

Shannon Waller: And again, I think what I really want people to appreciate is you live a complex life, not complicated, but complex. And it requires Who's, to use our Strategic Coach Who Not How term. And like Maddie just showed up as being this incredible Who to help manage otherwise stuff you would have to. Even the things you mentioned that I wrote down, there's a lot of volume of stuff.

Chad Willardson: Definitely.

Shannon Waller: Definitely. Like the new office building, the investment out of state, all the plane stuff, the CPA team, taxes, vendors.

Chad Willardson: And she deals with the book team. So my publishers and editors, she's really good at being a strategic process project manager, just looking at the whole project, seeing what needs to get done, making sure I'm on my timelines. Hey, Chad, you need to get this done for the book by this date to hit our publishing deadline. So I don't like taking all those meetings. I said, this is an advantage of a triad that we created is, I said, I want you guys to really, really, really get me. And I don't want to have to talk to a lot of other people. Like, I don't want to have to start over, you know, getting someone on alignment and this and that. Like, I'll tell you and you guys translate it to other people. How's that? You know, you guys get to know what I need and what I want. We all know each other. We have shared goals and you guys be the translators to meet with vendors or partners or other things like that.

Shannon Waller: So that's a huge amount of trust. It's huge. That you give them. So most people would be reluctant to give other people that degree of trust. And you must have heard positive feedback from everyone else that we're referring to here, because otherwise, I think one of the concerns is they're going to use it as a power grab. They're going to create their own little kind of territory. Are they actually representing me, Chad? You know, so what are some of your thoughts to address that?

Chad Willardson: I think increasing trust leads to increased freedom, and I am always about increasing my freedom. And so the more trust and empowerment I can give my team, the more freedom I get. And so I've always been one of those who is all about Who Not How and partnering, delegating, collaborating. Even if sometimes it's not done as good as maybe I could have done something, if I got freedom from it, I'm okay with it. It'll get the job done. I think we communicate so frequently that I have a high level of confidence that they are representing me. We have our 10x collaboration calls at the beginning of the week. Every couple weeks we get together in person. We go through all the different issues and projects and ideas and things like



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that, but I'm confident even though that both of them are with me for less than a year so far, but I'm very confident in the feedback I've gotten that I made the right choices.

Shannon Waller: That's fantastic. And I would imagine also, if you were doing all or the bulk of these activities, I know what I am, I end up being the roadblock. I end up being the bottleneck, which is super frustrating for me and everybody else. So I imagine things are happening, as we like to say, faster, easier, cheaper, with a bigger impact, because the two of them are you. It's like you times three.

Chad Willardson: Yes, it's funny. They went to lunch because I was like, I came first of all, two very easy hires. I knew I wanted them on my team after the first lunch interview. I was like, oh yeah, this is a done deal. I've got to have them working for me. I even told Oriya when we had our first conversation. I'm like, "You're going to be working for me. I can tell." Because she was like, "I'm not totally job searching right now. I figured I'd just take the call because you were really looking for somebody to add to your team, but I'm not really interested." And I said, "But there's a little window of opportunity, isn't there?" And she's like, "Yes. I mean, I'm open to it." And I was like, "All right, you're going to be working on our team." And once I made that decision, I was like, "I need you to meet Maddie. Because you guys are going to be working together a lot, doing different things, but for the same aligned goals." So they went out to lunch and I was just like, man, I hope it goes well, because it could be territorial. It could be like, well, who's boxing who around or what's this going to look like? And they both came back after like a two or three hour lunch and texted me and said, "I feel like I just met my best friend." Oh, they both extremely aligned, got along so well. And they were like, what do you love to do for business and work? And they both loved opposite things. So it was like, Oriya's like, "I don't want to deal with the numbers or the business or the spreadsheets or all that hard business detailed stuff." And Maddie's like, "Well, I don't want to deal with the personal stuff and all the travel booking and all the marketing stuff." And they were like, this is awesome. So that's why I say it's my left brain and my right brain. It was an easy division of labor because they were so clear on what they like and what they don't like.

Shannon Waller: Oh, I love that. By the way, the term the triad is not something I created, the teamwork part I did, but it really came from a brilliant book, Tribal Leadership. One of the co-authors was Dave Logan. I've got a great interview. We'll add it into the notes with him. He's brilliant. And there are five different levels. I won't go through all five, but stage three, which is where 48% of business, academia, and education is, is I'm great, you're not. So I think of that as elbows out, fighting your way over top of other people, you know, just that super competitive. But then there's a stage four where the motto here is we're great. And we're great means that competition is less and it's all kind of aligned towards that bigger vision. And the difference is when people just want stage three, it's just like, okay, I'm going to talk to you and you do what I tell you. I'm going to talk to this other person. I want them to do what I tell them, but I don't want the two of them talking.



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Chad Willardson: I get it.

Shannon Waller: That's stage three because you want to control.

Chad Willardson: Interesting.

Shannon Waller: When it's the triad, then actually you want the relationship to make it real between Maddie and Oriya. It's super important that that relationship to you is super strong as it is for you and Maddie and you and Oriya. Right.

Chad Willardson: Which is crazy because it actually is. And I was nervous about that. To be honest, I was nervous. I was like, well, they might be competing, like who can outdo the other one or like they might throw each other under the bus, but not at all. Not only are they good friends, but they work together very well. And if they're stuck on something, they tell me all the time, like, yeah, I'll reach out and say, hey, I'm having a hard time figuring out what Chad wanted on this or I'm having a struggle pushing us through the finish line. Can you help me? It's like, oh, yeah, here's a resource that we can rely on. Or I know where that old email is. Let's find it and pull it up. Like, they work together to get big stuff done and keep me in my Unique Ability and doing my Entrepreneurial Time System and not being bogged down by knowing about the struggles. Whereas previously, if I just had one EA and they were struggling with something, guess where it's coming back to? It's coming back to me. So what's cool now is it comes back to each other, they figure it out and solve it, and I don't even have to know.

Shannon Waller: Oh my gosh, I love it. And I'm sure some things do get elevated back to you, but it's going to be fewer and fewer, and they have lots of capacity so that you can throw in new ideas and new projects and adventures.

Chad Willardson: 100%.

Shannon Waller: Yeah, that's awesome. So a couple questions that come to mind, and we're going to get down to brass tax in just a minute. So do you use an Impact Filter to communicate some of your initiatives or ideas?

Chad Willardson: I do. We do use Impact Filters. We use the Weekly Planner. I would love to use even more tools, which leads me to this point. They both are fully enrolled in Coach programs now, which I think is awesome. So they have their own relationship. And of course, Maddie loves going to your sessions. I think it's called the team leader group, right?

Shannon Waller: Correct. Yep.

Chad Willardson: Team leaders. So they both have done the Strategic Assistant Program. Maddie's a team leader and a reason another program right now, I don't remember what it is, but she starts, I think, this month or October. So.



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Shannon Waller: Right. And I think actually Maddie did Team Tools.

Chad Willardson: Yes, she did. She did.

Shannon Waller: We were like, you could do Strategic Assistant or Team Tools, but she needs to be in Team Tools.

Chad Willardson: Yeah. Yeah. So the point is, like, they're collaborating, they're learning, they're growing in their own role. And it's all designed to create a superpower team that creates more freedom, more success, and more Unique Ability teamwork.

Shannon Waller: I love it. And have you experienced that? Have you experienced more success, more freedom, more teamwork?

Chad Willardson: Absolutely. Yes. I mean, it's crazy. It's changed a lot. I look back to having one EA and I'm like, who did all the other stuff? You know, like, because they're both very busy right now. I think I just got pulled into a lot more of the day to day stuff. And now my mind is more freed up. My time is more freed up to think bigger and to think Free Zone collaborations and to just focus on what I do best and not be hassled with a lot of the stuff that I would be normally hassled with.

Shannon Waller: Mm hmm. Well, and I think about like you've written, this is your fourth book in four years or less.

Chad Willardson: Yes. Fourth in four years.

Shannon Waller: Yeah. And then you've got the phenomenal podcast with Scott. Talk about that for a moment.

Chad Willardson: Yeah. It's called the Smart Money Parenting Show. And we reached the number two ranking on Apple podcast for parenting and family. We talk about, essentially, how to help parents be better at teaching their kids about money. But like lots of these things I wouldn't have the capacity to do if I didn't have two superstars to my right and my left.

Shannon Waller: Yep. Yeah. And Gravy Stack.

Chad Willardson: Gravy Stack. That's a collaboration business with Scott Donnell. And now I don't know if you heard, but we're bringing on Lior as one of our top leaders in the tech department. So it's going to be lots of Free Zones. Strategic Coach clients are invested or they're participating in building this company to help kids learn about money.

Shannon Waller: Superstar team. I love that. Yeah. So all of these new things become possible when you're leveraged. Do you see at some point them reaching a capacity where you might need to add another person?



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Chad Willardson: It's a good question. You know, originally it was like I was getting advice from other entrepreneurs that said, have your EA hire her own assistant. Mm hmm. And I was like, I don't know if that's really the route I want to go just to have my EA have an assistant. And that's when you thankfully said, well, what about this idea, having the teamwork triad of these three people? And so maybe in the future, they have an assistant for themselves. I don't know. I don't know. I feel like we just keep getting better and partnering with other people that I don't know that that's going to be necessary. But if it is, we'll cross that bridge when we get there.

Shannon Waller: And it might be another triad that you're not involved in.

Chad Willardson: Yes, I wouldn't be involved in it, I don't think. I want to communicate with these two people and not very many other people. That's what I told them. I said, look, all these people who want meetings, like you screen them for me. I love it. Here's what I'm looking for. Here's the filters. And if it's going to get through to me, then we'll talk about it. But you'd be the screener, not me.

Shannon Waller: I love it. One of the things that's key that you mentioned a moment ago was communication. And this is one thing that I'm kind of always pushing. I'm sometimes noticing that people don't think to actually sit down with their support teams very frequently. And I'm like, how else do you think they're going to read your brain? Yeah. So you mentioned that you meet weekly about your 10x aspirations and the teamwork. But what other connections, because you also, you're very tech capable. So I'm not sure if you send voice memos or if you've got short chats or however you communicate with them. So how does that back and forth work and what's it look like in terms of timing?

Chad Willardson: So we communicate on Teams. We use Teams for communication and messaging. And then for task management, we use Asana. So we assign each other tasks. We assign ourselves tasks. We can see what projects are moving along. So Oriya managing my calendar will have, like she had an appointment for a podcast like this and inside my Google calendar, cause they both have access to my Google calendar and all my email accounts. So when we talk about trust, they have access to all three of my email accounts, personal and business. So inside the Google calendar appointment, there will be a link. And it'll be an Asana link or Google Doc. And I'll click on the link, it'll take me to Asana, to the task that I'm supposed to complete to prepare for that podcast. So we really keep projects and tasks organized through Asana, and then messaging is through Teams. If it's an emergency or something really urgent, it'll be text or phone call. We're all remote, essentially. I'm usually traveling or out and about in the world, right? And we'll communicate through that method, but we talk a lot. I mean, I'm talking to Maddie and Aurea every day. Yeah. So, but we have a formal meeting with an agenda every Monday. We have a recap on Thursday afternoon and then every other week we have a 10x collaboration session in person.

Shannon Waller: Ooh. I like that.



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Chad Willardson: Which is fun because Dave mentioned it. Maddie mentioned it last time. She's like, I get a lot of energy when we're together in the room. And, you know, usually we go to a coffee shop or a restaurant and we're just talking. We got our notes out and I'm sharing vision and excitement and they're sharing what they're working on and anything that we need to solve together, we solve right there. But we all walk away with excited feelings about what we're going to work on next.

Shannon Waller: I really love the pacing of that. First of all, you've got phenomenal technological systems to support you, like Asana, Google Calendar, Teams, all the things. I was smiling as you were talking because Katrina, my brilliant support partner, did the same thing. I had a whole Google Doc with your amazing document, which I'm gonna find a way to share in the show notes, of how they work together. So I'll share some of those before we close off. And then also we were talking about Working Genius, so I had that information. It's a special little note right beside the calendar, so it's really fun. That's awesome. Their systems are not dissimilar and we're finally getting into Asana, which I'm thrilled about, because that will make it a lot easier. But you're also very willing to share your time and your energy and your enthusiasm, like that's culture building. So when they get to hang out with you and they get kind of plugged into the mothership, as we sometimes call it at Coach, it's key because it's every other week, which is great, but checking in with the vision, checking in with, you know, what's up, solving problems right away and taking action, that is so validating for the teamwork. That's just a great structure. I love that. Thank you. Thank you. Welcome. All right. So I want to share some of the things that they have written down, if I understand correctly. Right, Chad?

Chad Willardson: Yes. They built that. I did not build that. Yes. Okay.

Shannon Waller: So I'm just gonna read them. This is the condensed version of, so EA Collaboration Guide, Harnessing the Synergy of Two Executive Assistants. So number one, roles defined. Operational EA, ORIYA, and Strategic EA, MADDIE. So that would be Innovation Manager in our terminology. Diversity and skills, as you've talked about. Prioritize communication. They just did this. Weekly and biweekly meetings keep everyone on track. Directly address the right EA for a specific issue. So one of the things you're not doing is like a scattershot approach. And some entrepreneurs, when they can't keep things straight, will just send a blast out to two, four, six people. And then everyone being very responsible takes action on it. And then it makes a mess. The client gets called three times by three different people.

Chad Willardson: Oh, my God. And that's been a learning process. I sure in the very beginning, I was like, I'm not sure which of you should do this, but someone do it, please. But, you know, now that it's been, let's see, June, July, August, September, it's been four months since I've had both of them. Yeah. And their roles have just gotten clearer and clearer. And they communicate with each other way more than I communicate with them. So they're constantly saying, hey, what do we do on this? I'm going to take this project. Can you help me with this? The division is very clear.



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Shannon Waller: Yeah. And when they take lead on that, like you even say, I'm not sure who, if someone needs to put their hand up and go, me, right? That's actually a sane way to do it. There's some less sane ways to do it. So, but they actually talk a lot and do that division of labor. So that's great. So their point number four is prevent overlapping. So I like that. Effective collaboration, shared calendar and tools, like Asana and Teams. So that's great. Oh, oh my gosh. Avoid scattered communication.

Chad Willardson: There you go.

Shannon Waller: I hadn't read that.

Chad Willardson: As you said it.

Shannon Waller: I know. There you go. So what's the next one? Designated workflow, which is a time task based on strengths, and I'm sure your technology helps with that. Team unity, which I like that. Mutual respect and regular communication are essential.

Chad Willardson: Yeah, and I say neither of them are above each other. They both started this year, but even if one of them was 10 years, my EA and the other one is brand new. Like I am very much about a flat leadership environment. You know, I want people to all feel respected and they all have a voice.

Shannon Waller: The reason why I call, first it was Nicole and now it's Katrina, why I call her my support partner is because it is a partnership. I can't do what she does. I'd burn out in a minute or I would make a huge mess, both of which would be true. And so it really is a partnership. Obviously, yes, financially and stuff, there are some other structures in play, but in terms of their work and daily contribution, it is a partnership. And it's one to support what each other is up to. So, you're supporting them and they're supporting you. So, I like that. Feedback is vital. Regular specific feedback for each EA ensures growth and alignment and encourages growth. Tailored training for each EA include courses and book reports related to their functions. So, I love that. And then there's a detailed guide which goes into more. Oh, this is fun. Embrace the yin and yang. Yeah, I love that. Yeah. So we'll include that in the show notes. But I just love that they put that down. We'll also include the guide that Nicole wrote, which is kind of like how to work with someone like me, who's a long Quick Start. So we'll include all of those amazing resources that our support partners have created, which is really fun. Love it. So just to kind of wrap up our conversation, is there anything else, any other dynamic about this that you think we should know in terms of making this teamwork triad either work, from either inviting people in, being compelling, keeping it working, any thoughts?



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Chad Willardson: Yeah, I would say one thing I did in hiring them, first of all, I did all the assessments. I did the Kolbe, the CliftonStrengths, I did the PRINT, I did the Working Genius. And one thing I had the thought, I was like, I was asking you, I was asking Julia, I was asking everyone else, like, how do I make these people work together? Like, I don't know how to have two EAs. I've never done this before. You know, how do I build this triangle? Well, I asked ChatGPT. And I said, here's one person. Here's Maddie. Here's all of her assessment results. Here's Oriya. Here's all of her assessment results. Here's what I'm excited about with each of them. Now tell me how to work together with them. Tell me what they'll be good at together. Tell me where they might have conflict or struggles. What warnings would you have? How do I make it successful? And it was crazy because I got very detailed and excellent feedback. And I actually, as I was hiring them, I shared it with them. And I said, look, this is not for me, but Mr. ChatGPT says you guys could have conflict with this, this, or this. And I said, how would you deal with that conflict? You know, I just put them on the spot and they talked about, no, I don't think that's going to be a problem because we're going to communicate regularly and we have different roles and this and that. So I sought a lot of advice on how to help them be successful together. And then how to make sure they were working in their strong suits to accomplish the goals that I've set and the vision that I'm setting out for the future. And I think that attention to detail makes a difference because if you just hire based on personality or job experience, you might get two people that are too much the same. And now you've got duplicate personalities or duplicate skill sets. And you are going to run into problems because they're both going to want to grab the same task for you. And that's going to cause a problem. So I think the beauty of it is when the light went on for me, the light bulb went on and I was like, wait a second. They're very similar. They're both capable, friendly, professional, ambitious, supportive, all these things. But as far as what they enjoy and their skill sets, they're complete opposites. So that's when I came up with like, I have my right brain, I have my left brain, and they're going with me everywhere. And so I think that's a key thing is to not hire based on just winging it and your gut instincts, but actually do the homework to make sure that these people are the best fits.

Shannon Waller: And kudos because you made the investment. First of all, you know yourself well, right? So you know your own Kolbe, 7681, you know your Print, 37, which for those of you not familiar is to succeed and achieve and to enjoy life and be happy. So awesome parties is what that spells.

Chad Willardson: Awesome travel and awesome parties.

Shannon Waller: Awesome travel and awesome parties. And then there's lots of other profiles, including your CliftonStrengths and Working Genius. But you know yourself well. You've invested in the Unique Ability process with Julia Waller. 100%. So you are very astute. It's not on the subconscious level. You're not clueless. You know what triggers you. You know what doesn't. You know where you've got grace. You know where it's challenging. You know yourself well enough. And that's huge. I think being a self-aware human, hey, it's my recipe for success, but it just makes a huge difference when you get into teamwork. And then you also drove that down to the next level so that they would have a very similar language, which should be able to



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understand themselves and communicate what was working for them, what was a trigger for them. Now, what I think is Oriya is, Oriya, sorry. Oriya, yeah. She also wants to succeed and achieve. Yeah. Right? Yeah. And like me, be strong and self-reliant. So that's kind of fun. And then Maddie is someone who needs to be perfect, correct, and right, and to be needed and appreciated, which she certainly is in this role. So you did all the things, you shared them with me, so I know all the things too, which is really fun. So what would you say, two things about the teamwork triad. You've talked about the difference it's made to your life. What advice would you give to other people? And then what do you see is possible moving forward? Like if you play this out, it's relatively new. Maddie's with you just over a year, I think?

Chad Willardson: No, just.

Shannon Waller: Just a year?

Chad Willardson: Yeah, nine months. Nine months. Wow. Nine months and four months, the two of them.

Shannon Waller: That's incredible. So project out five years. What do you think is possible?

Chad Willardson: It's interesting. The advice I would give is you as an entrepreneur and as a visionary, if you're looking to grow beyond being like an operator of your business, your primary business, you have to create an all-star team around you that supports you. There's no way I could get this level of support inside my primary business because they're focused on the business. They're focused on client management. They're focused on operations. They're focused on responding to everything that our clients need. So this is critical and I think it's overlooked by most entrepreneurs. They have maybe a support person who probably kind of works inside the company, maybe not, maybe it's a hybrid situation, but creating the team for just me, like managing Chad Willardson Inc, if you will, even though I don't have that, but like, it's just different. You know, we created chadwillardson.com because Oriya is all dialed into branding. And I'm like, you know what? It's true. I shouldn't be limited to just one of my companies. I've got more stuff going on. So creating that triad outside of your business makes you think bigger. The leverage is huge. And where I project this going in the future is that larger and larger business projects and business deals and collaborations managed by Maddie and her role elevates to do all these business deals and business transactions and collaborations while Oriya is making sure I feel good and I look good with branding, with protecting my time, protecting my UA, making sure my schedule is still full of freedom. You know, she's the one who's like, hey, we need to get you on a trip to an island or something, like you've been hammering Focus Days or you've been bogged down in stuff that isn't your best use of time or Unique Ability. Let's get a trip on the books so you can go off with your wife to Hawaii or Cabo or somewhere around the Caribbean or something because she's protecting that. So I think it just gets magnified over time and we're doing bigger things.



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Shannon Waller: And I appreciate how you said that. Your team actually looks out for you and the bigger picture. You don't have to be the only one driving it, right? So she's taking care of you. Maddie will propose ideas and suggestions as well. So then you've got this like brain trust helping you build your bigger future. And I think my biggest takeaway is it makes you think bigger. It's true. And I know for me, until I have some of the strategies or support in place, I don't think bigger. That's how my brain works. Frustrates me sometimes. I can't just make stuff up, even though I'm a 9 Quick Start. But when the support is there, when the resource is there, all of a sudden I can see now what's possible. Yes. And I'm thrilled that the Teamwork Triad has done that for you.

Chad Willardson: It has. The clutter is gone. The leverage and freedom is up. And Unique Ability is just square in the middle. I don't remember who I told. I was like, I don't have a ton of stuff to do right now. So it's like people might assume that I'm crazy busy, and I am, but not totally. It's just Unique Ability stuff. So most of the bother, thankfully, is removed by my two superstar support partners, EAs, triad people, whatever you want to call them, but Maddie and Oriya. And it's been an incredible change and lift to have Maddie and Oriya on my team this year, something I didn't really imagine was possible.

Shannon Waller: Well, kudos to you. It took commitment and it took courage to do it. Right. You were stepping into the unknown, something you'd never done before, hadn't really been documented much. Turns out ChatGPT knew way more than we give it credit for. But you've just got super resourceful, as you always do. And I love it. And it's super fun for me because I've experienced it. So I know what it's like. But I just love Chad and appreciate that this was an answer to what you were looking for. And you implemented it brilliantly, as you so often do with the support and partnership of Maddie and Oriya. So it's really fun to see this come to life.

Chad Willardson: By the way, I just realized M.O. I got the momentum. I got Maddie and Oriya. I got the M.O. We're going places. This is perfect.

Shannon Waller: And then OM, you also get the chill and the relaxation.

Chad Willardson: That's true. That's true. That's true.

Shannon Waller: I love it.

Chad Willardson: Either way.

Shannon Waller: The other way it works. For me, it's really fun hearing the story from you.

Chad Willardson: Because you were a part of it from the beginning, from before. I had a decent EA before. Both Maddie and Oriya are individually more effective. And I have two. And our team is just on the rocket ship. So I love it.



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Shannon Waller: Well, it shows what happens when you are right fit people. Yes. And as EOS would say, in the right seat. So I love it. Congratulations on your success. I can't wait to hear how it evolves and grows. And I'm leaving with, it makes you think bigger. So thank you so much.

Chad Willardson: Thank you. Thanks for having me.