

# KNOW NO BOUNDS

## COACHING SERVICES

Most of you already have a practice, a book of business, a team, and even a pipeline of prospects, yet something isn't right. Maybe you are suffering from **growing pains** in your business. Perhaps you are overwhelmed by the **increase in the activities** it takes to conduct this business and continue your success. Perhaps **regulatory demands** are hindering your growth rate or there are things falling through the cracks and you **feel disorganized**. Maybe you feel you've ignored some of your clients and you fear you will lose them, or even worse, you already have lost a couple of good clients. We want to change all this! We want to help you run your business rather than let it run you! If any of the aforementioned scenarios resonate, our diagnostic tools and coaching services will help you transform your practice.



**KNOW NO BOUNDS** can help you uncover best practices for achieving your success. When implemented, these simple concepts and activities can lead to identifying and living your passions both at home and at work; regaining your focus, increasing business and ultimately, improving your life balance!

We are NOT cookie-cutter coaches! All coaching initiatives are CUSTOMIZED to your needs and begin with utilizing true diagnostic tools to really get to the root cause of your challenges.

### DIAGNOSTIC

- Practices with **3 or more people** begin with our Performance Insights Process™ and all team members complete 3 online assessment tools. Individual, Team and Business Performance reports are provided to the team and discussed through 3 consulting calls.
- Practices with **1-2 people** begin with our fact finding and discovery process. This initial call is dedicated to really listening to you and your needs; getting to know your practice, team, strengths and challenges. An Opportunity Document is delivered suggesting specific actions based on your needs and the fact finding session. Here prioritization and commitment to action takes place.

### EXECUTION

- It's time to start the real work! Whether through conference calls or in-person sessions, we'll begin to work through specific activities to achieve your objectives. Coaching sessions are provided at flexible intervals based on your needs and objectives.

### ACCOUNTABILITY

- Notes are distributed after each coaching call providing clients with a synopsis of the session and mutually agreed upon action items.

### RESOURCES

- Coaching clients receive specific tools to help integrate the ideas discussed into their business.

## ONGOING FOLLOW-UP AND EVALUATION

- KNB is committed to exceeding your expectations. Ongoing follow-up and evaluation are key to ensuring we do just that. This is your opportunity to provide feedback and is often the basis for our ongoing relationship.

## FEES

### ■ Team of 3 or more

- The Performance Insights Process™ fee is determined by the number of team members you have. The base fee is \$1500 per team of 3 members. Additional team members are \$150/per person. All discovery, assessments, analysis, and 3 certified telephone consulting sessions are included.
- Ongoing coaching is billed at \$160 per hour

### ■ Teams of 1-2

- Initial discovery - \$450
- Ongoing coaching is billed at \$160 per hour

## TESTIMONIALS

*"Sarah has been and will continue to be an integral part of my business. She began working with me to structure a team with the right people, in the right positions so we could continue to **grow the business and service our current client relationships**. Her **experience** in the industry makes her a great consultant, her **interpersonal skills** allow her to be effective with all the team members and her **passion** and 'love for life' make her a **fantastic coach**. **Revenues and efficiency have improved drastically** due to Sarah's **creativity and expertise**. She is invaluable."*

- Paul Brinkley, Regional Firm, Coaching Client

*"If there is anyone for whom the word "client" is important, it is Sarah Dale. Since she started working with me, I have **increased my COI network** and am in the process of putting together a COI service plan, I have **increased my number of calls daily**, have **improved my "ask"** for business and have seen my number of large cases increase, and have **improved vital lines of communication with my team**. She has worked with my assistant to standardize many of our **client communication** procedures and she has jump-started most of our **marketing practices**, including my website, elevator commercial, client appreciation programs, segmentation - you name it. On top of it all, Sarah did an **in-depth fact finder** on me and realized the best way to successfully manage me to get the best results, something she does rigorously and it works. To top it all off, we laugh in our sessions and have a great time, all the while focusing on my clients and how to provide them with the service and care that they deserve."*

- Harold Philipsen, Northwestern Mutual

*"Looking for **success habits**? Call Sarah! Her coaching has made a difference in my business from both a revenue and efficiency standpoint. She focuses on the '**actionable**' not the 'conceptual.' Her words of wisdom forced me to commit thoughts and ideas to paper which she then helped me incorporate into my business subsequently making them a regular part of my routine."*

- Financial Advisor: Regional Firm

*"Sarah is a **results-driven** professional with broad-based experience in multi-disciplinary facilities, encompassing all aspects of sales management, business development, and client relations. An accomplished professional and effective communicator, she possesses **excellent interpersonal and relationship building skills** and is a motivational leader with the ability to build, train, inspire, and mentor successful teams to outstanding performance."*

- Rick Gambriel, Director of IT