

# KNOW NO BOUNDS

## CONSULTING, COACHING & CREATIVE SOLUTIONS

Success begins and ends with people. Whether you are looking to achieve your personal goals or realize the goals of your team, department, division or company, **Know No Bounds** can help! Focusing on ROP- Return on People and Return on Process, we work with you to help optimize your Performance!

The world has changed dramatically yet so many of us continue to function utilizing old processes and thought patterns. It doesn't work! To re-gain clarity from the confusion of the 'new fast-paced world,' we need to think differently, eradicate old boundaries, maximize the innovations of IT solutions and enact different activities in order to realize our success.

### CONSULTING

**Know No Bounds** aims to help businesses, teams and individuals make significant enhancements in their performance by generating creative ideas that produce long-lasting impact and value. Utilizing a collaborative approach, we seek to uncover opportunities and develop tools to help you build business and develop lifelong relationships while having fun in the process.

### COACHING

Somewhere along the line, life has become so busy and we seem to be in a constant state of *too much to do, too little time!* It is more important than ever to make adjustments to reach our goals more efficiently and effectively. **Know No Bounds** can help you uncover best practices for earning more and working less. 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!

### CREATIVE SOLUTIONS

Perhaps you are looking to create content, package a new seminar or run a creative brainstorming session. From facilitating meetings to providing content for virtual coaching modules or marketing purposes, we work with you to generate creative solutions to meet your needs.

### SPEAKING ENGAGEMENTS

Whether a keynote or workshop environment, Sarah Dale is available to captivate your audience with both her excellent content and interactive, fun delivery skills.

*"Everyone defines success in a different way; however, building strong relationships whether personal or professional is a vital part of the equation regardless of your definition of success. In the business world we tend to be obsessed with 'the numbers' yet they don't happen on their own. Yes, the numbers are important, but it is people who drive them, aided by IT solutions, developed by people who understand the business. Focus on people, IT and activities and you'll attain your numbers, your goals and your success! At **Know No Bounds**, our work focuses on your people, their passion and their purpose." Sarah Dale, Founder and CEO.*

"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)*

**Know No Bounds** is committed to *making a difference* to you and your business. Results driven, we look for *unique* ways to help you **envision**, **enact** and **enjoy** your business and your life!

# SARAH DALE

**LEADER, CONSULTANT, COACH, AUTHOR,  
INNOVATOR, SPEAKER**

## OVERVIEW

Founder of **Know No Bounds** and co-author of Know Service, Dale's unique background combines the roles of **business development, service and leadership**. Her career has evolved from success working with clients to developing products and programs, implementing strategies for building and leading teams, developing and delivering training and coaching initiatives, creating efficiencies and growing revenues. Fanatical about people, Sarah is a true advocate for clients, associates and shareholders. Her **creativity, communication skills** and **passion to make a difference** add something unique to the individuals, teams and organizations with whom she works.

## EXPERIENCE

Sarah started her career in the financial services industry in 1990. Her background includes serving as President of a training and online solutions company, where her responsibilities included creating and managing all areas of a small business that provided **coaching and development services** to financial professionals. Sarah created and delivered business building content, including virtual programs utilizing web-based technology, printed materials, workbooks, e-books, whitepapers, audio visual CD-ROMs, and live seminars. She utilized her skills in developing fresh, actionable ideas, client acquisition strategies, client development techniques, leadership initiatives, and practice management opportunities.

Sarah also served as **director of marketing and training** for Scott & Stringfellow, a regional, full-service investment firm. She served on the management committee responsible for the **strategic development** and management of the firm and was responsible for forming and running the *Creative Business Development Department*. Her overall responsibility included marketing, advertising, public relations, corporate communications, the web, sales incentive programs, and the development and facilitation of training programs. Additionally, Sarah works as liaison between the brokerage firm and parent company developing referral programs and exploring areas of integration. She chaired the Private Client Group's annual sales conferences, *Service Plus* Committee, Marketing Committee, and Training and Development teams.

Today, Sarah serves as President and Founder of **Know No Bounds**, a **consulting, coaching and creative solutions company** serving the financial services industry. Know No Bounds aims to help organizations, teams and individuals make significant enhancements in their business and their life by generating creative ideas and valuable solutions that produce long-lasting impact ... while having fun in the process!



## SERVICES

- Consulting
- Coaching & Training
- Motivational Speaking
- Content Creation
- Business & Team Development
- Strategic Planning

## SELECTION OF TOPICS

- Client Development
- New Client Acquisition
- Communicating for Success
- Organic Growth
- Service *with* Sales
- Maximizing the Team
- Creating & Sustaining Efficiency
- Practice Management
- Finding Your Balance
- Seeking the Leader Within

## STRENGTHS

- People
- Creativity
- Leadership
- Communications
- Results Driven
- Problem/Conflict Identification and Resolution
- On Time/On Budget Project Delivery
- Powerful Combination of Business, People, Number & Technical Skills

## EDUCATION AND PERSONAL BACKGROUND

Native to the south of **England**, Sarah earned her bachelor's degree from the **E. Claiborne Robins School of Business at the University of Richmond**. She is also a graduate of the **Securities Industry Institute at the Wharton School of Business** at the University of Pennsylvania where she served as senior class representative. Sarah returned to Wharton in 2008 to teach a class as part of the SII curriculum. Sarah holds **series 7, 9, 10, 63 and life and health licenses**. First **published** in 1995, Sarah coauthored "The Question and Answer Book of Money and Investing" and throughout her career has published numerous articles on financial services-related web sites. In 2007, Sarah co-authored "**Know Service,**" **5-Steps to 5-Star Service for Financial Professionals**. Sarah serves as Vice President of the MathScience Innovation Center Foundation in Richmond, Virginia. Currently living in Williamsburg, Virginia, her **passions include fishing, writing, travel, reading, culinary experimentation**, and spending time with her two **four-legged children**. With her family all living across the pond, Sarah is thankful for her friends who have become her American family.

## PHILOSOPHY

Sarah is described as passionate, loyal, and unique! Her motto is "*have faith, have fun, and love what you do, for life is too short for anything less.*" Her goal is to make a difference in everything she does and become a true advocate for each and every client.