

KNOW NO BOUNDS

Coaching

Making a Difference.



Consulting, Coaching and Creative Solutions to Realize Your Success!

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!

We aim to help our clients 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!

Delivery: At **KNOW NO BOUNDS** we package our coaching and consulting solutions based on your needs. There is no one size fits all with us—our services are developed to accomplish your specific goals and exceed your expectations. We do not believe in regurgitating concept—our solutions are **action-based** and may include activities, exercises and even role plays depending on the topic at hand. Through phone and/or in-person consultations, KNB coaching solutions are devised to produce long-lasting impact and value.

Audience: We provide coaching services to the **lead advisor, support associates, internal specialists** and entire **team**.

A Selection of Topics:

- **Practice Management:** Optimize Your Practice; Creating and Sustaining Efficiency; Developing and Maximizing the Team; Process Development and Execution for Sales and Support Roles.
- **Client Development:** Discover Organic Group Opportunities; Delivering Service that Drives Sales; Communicating for Success; Creating the Perfect Client Experience
- **Client Acquisition:** Developing Your Referral Strategy; Building Client Advocacy; Marketing You and Your Team
- **Leadership:** Seeking the Leader Within; Finding Your Balance

Project Based: In addition to our coaching services, we frequently work on specific project .

At **KNOW NO BOUNDS**, we are 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!

See page two for more information on the coaching process!

KNOW NO BOUNDS, LLC

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Know Process

Fact Finding.

- Discovery time dedicated to really listening to you and your needs; getting to know your practice, team, strengths and challenges.

Discovery Document.

- Delivery of suggested coaching initiatives 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 coaching and consulting activities to achieve your objectives.

Ongoing Follow-Up & 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.

Coaching Deliverables

Discovery Fact-Finder:

- Identifies opportunities and serves as a coaching roadmap and accountability document.

Session Notes:

- After each coaching call, clients receive a synopsis including mutually agreed upon actionable items.

Resources:

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

Testimonial: Harold Philipsen, Northwestern Mutual

"If there is anyone for whom the word "customer" is important, it is Sarah Dale. Not only is she focused on her own clients, she is nearly obsessed with mine! "Sarah coaches me monthly on how to make my clients the focus of my business. Rather than beating me up over the number of calls I make daily, Sarah is working with my team and me to systematically develop a practice that focuses on serving my customers and giving them the best service they've ever received from a financial services representative. Since she has 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."

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