

KNOW NO BOUNDS

Making a Difference.



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, Financial Advisor, Coaching Client

*"Sarah Dale has been a great resource to me in conducting several **successful client sales campaigns**. As a result of her valuable contribution, my **clients experienced a significant increase in assets under management**, as well as a broader brand awareness of their financial account services. Sarah's programs are successful because she delivers the **right mix of industry expertise, creativity, passion, and a "cracking" sense of humor**.*

- Laura Deger, Senior Vice President, Federated Investors, Inc.

*"There are very few people who I have worked with more accomplished at what they do than Sarah Dale. She is **enthusiastic, energetic, intelligent and hardworking**. You often hear me use the phrase that everyone needs people who have **talent, urgency and passion**. Sarah Dale has all three of these to the nth degree."*

- Walter S. Robertson, III, President & CEO: Scott & Stringfellow, Inc.

*"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, Cavalier Telephone

*"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 more than just a subject matter expert; she has taught us about leadership and living. When you think of Sarah you simply smile; she has **impacted many people for a lifetime**."*

- CIO: Regional Brokerage Firm

*"As a Director of Training for Chatfield Dean in the late 80's early 90's, I was immediately drawn to Sarah when I met her in 2001. She is one of the most **energetic** women I have ever met in the industry. Sarah brings **passion** to the financial industry and gives you the **vision** it takes and the tools necessary to go after your dreams. I only wish she had been my coach when I was a young broker. She is **loyal and well spoken** and I am proud to call her my friend and colleague."*

- Georgia French, CFP, Vice President/Branch Manger

*"Financial advisors continually look for tools to help them **attract and retain clients**. Typically the unexamined tool is their service model. If you are looking for **"the edge" in service excellence** and want to build lifetime relationships with clients, you must read this book! Service excellence truly knows no bounds."*

-Senior Managing Director & Advisor

Contact Us:

Know No Bounds, LLC
2860 Jonas Profit Trail
Williamsburg, VA 23185

Tel: 757.258.0008

Mobile: 757.310.9110

Fax: 757.229.5592

E: dale@KnowNoBounds.net

www.KnowNoBounds.net

www.BoundlessPublishing.com

Envision. Enact. Enjoy.



KNOW NO BOUNDS

Making a Difference.

Sarah E. Dale

**Leader, Consultant, Coach,
Author, Innovator, Speaker**

“Sarah and Krista’s process to building long-term, successful client relationships is the most innovative and comprehensive solution I have seen for the financial community. It is simple to follow and their tools provide a roadmap for immediate implementation! Executing these ideas is a sure way to take your business to new heights.”

Millye Dupke

Agency Manager, National
Agents Alliance



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*“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 Carol to standardize many of our customer 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 Philipson, Northwestern Mutual

*“**Selling and service are all about passion.** Grab some of Sarah Dale’s passion and your results will dramatically increase”. **John Sherman, Former President & CEO of Scott & Stringfellow***

*“Know Service is a phenomenal resource – the authors have recognised that service is how you **differentiate yourself** and the book chronicles the key service strategies you can adopt to ensure your financial firm is **‘extraordinary’.**”*

- Rob Sandwith, Chief Executive, Rosan Helmsley Limited

*“This ‘must-read’ book reveals how to use service to **drive sales, build lifetime client relationships** and bring **powerhouse efficiency** to your practice. Having known and worked with Sarah since 1991, I can highly recommend her innovative techniques to increasing your success. Sarah’s creativity, distinctive background and industry experience are unique and magnetic! She understands the critical nature of relationship-building in this business and excels at developing inventive solutions and helping others attain new levels of achievement. Read this book before your competitors do!”*

- Tyler Carr, Senior Vice President, John Hancock

*“Sarah’s presentation skills **captivate** the audience! So often in listening to speakers, their content is good but their delivery lacks passion. If the speaker doesn’t have excitement for their subject matter, the audience tends to drift off. Sarah is one of the few speakers who have both **great content** and **delivery skills**. Her diversified industry background has given her a wealth of knowledge and hands-on experience allowing her to really **resonate with all types of audiences**. Whether advisors, sales assistants, executive leadership, support staff or even spouses of financial professionals, Sarah can make a **connection** and hold the audience. Her **commitment** to her topics and **industry knowledge** shine through whether in a workshop or keynote setting.”*

- Mike Ball, Senior Managing Director

*“Sarah - I consider your presentation skills to be one of your **strongest assets**. You know your subject matter and your passion for the matter comes through to your audiences, (and English accents always make people sound smarter- except 1775-1781 and 1810-1812!). All of your presentation efforts for our company have been **well received and enjoyed.**”*

- Walter S. Robertson, III, President & CEO, Scott & Stringfellow, Inc.