



DON SARDELLA

TRANSFORMATIVE RESULTS FOR YOUR LIFE & BUSINESS

INSTITUTE FOR LEADERSHIP
DEVELOPMENT, LLC
EXECUTIVE SUMMARY
PRESENTATION FOR 2020

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WELCOME MESSAGE

Thinking of a Business Development Coach?

I am often asked “Can you help me grow my business?” My typical response is "What for you constitutes a great life and a life well lived? Based on that, let's talk about how we can help you organize your business to serve living your dreams."

I invite you to have an exploratory conversation – whether we get to work together or not, you will have a fresh ear to help you consider what else might be possible and within reach for you and the people you care about most.

BRIEF INTRODUCTION



Don Sardella has been coaching, consulting and facilitating for clients since 1987.

The majority of his recent 20+ years has been primarily working in the financial services industry, incorporating his broader, entrepreneurial development resources with it.

His professional skills focus is on effective leadership, team and business development.

By utilizing leading edge coaching practices, Don helps advisory clients to produce their desired and necessary results. Clients report their experiences as inspired, understandable, challenging, synergistic, relevant and rewarding.

Don's primary goal is to help people apply what they have learned to create a more energetic life,

with more money and less stress, and then creating their entrepreneurial business model to support living that life.

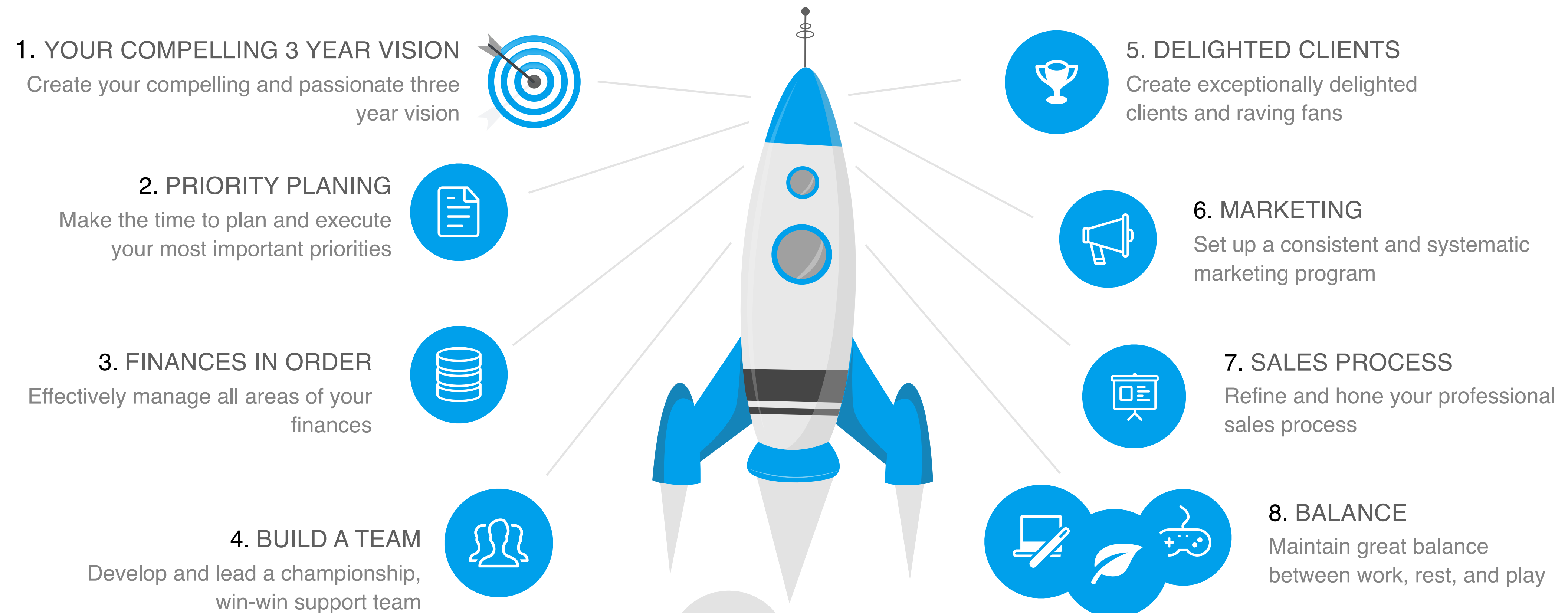
Don has worked inside of every major national firm and most regional firms, as well as with many independent advisors.

Don has helped thousands of Financial Advisors increase their professionalism, productivity and profitability, thereby measurably improving their business performance. Many focused on improving their annuitized business models, reducing their labor intensity as they served clients.

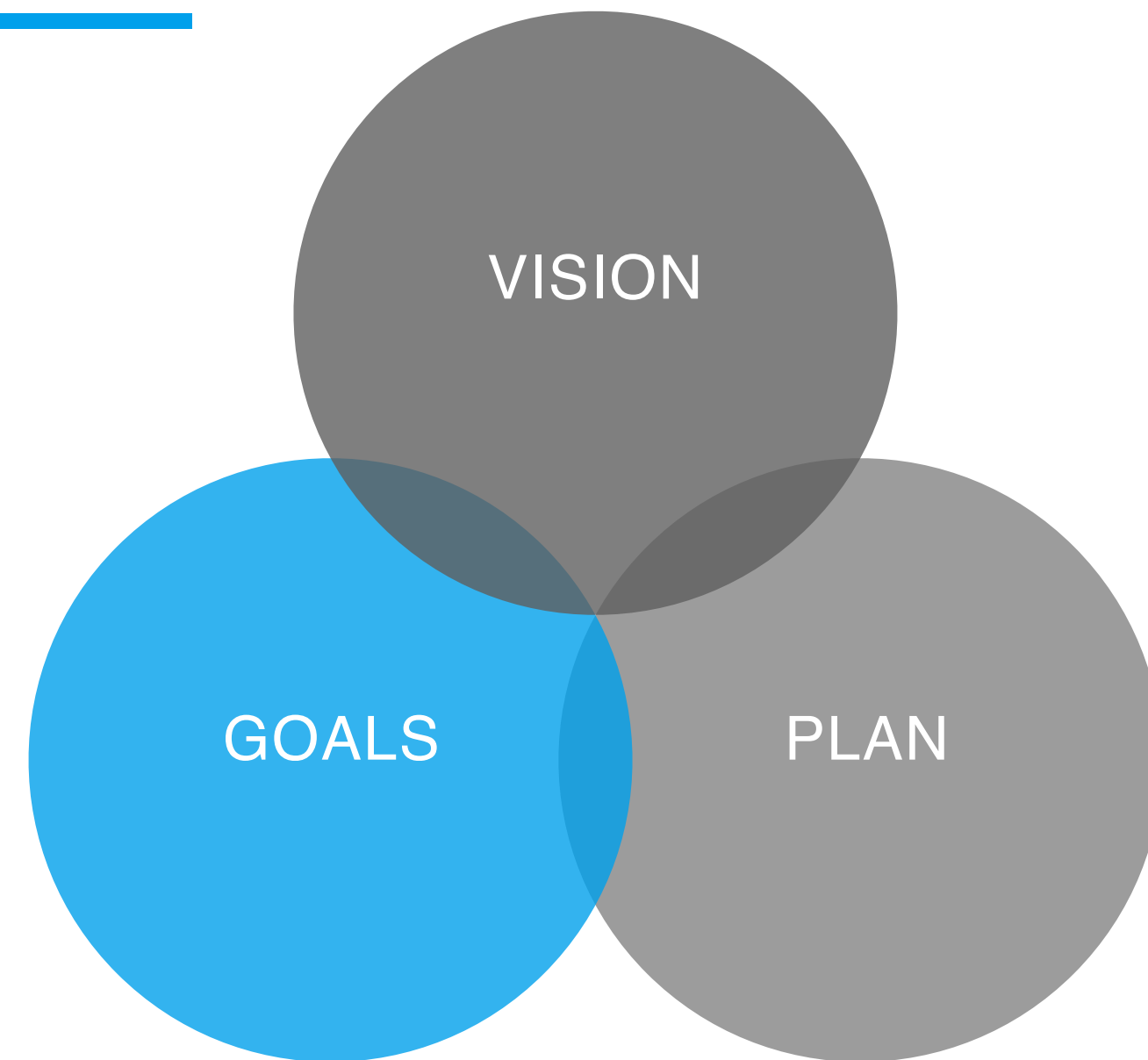


8 KEY STRATEGIES FOR BUSINESS SUCCESS

Utilizing his previous training as a design engineer, Don's coaching process is systematic and organized. His process includes 8 Key Strategies for Business Success:



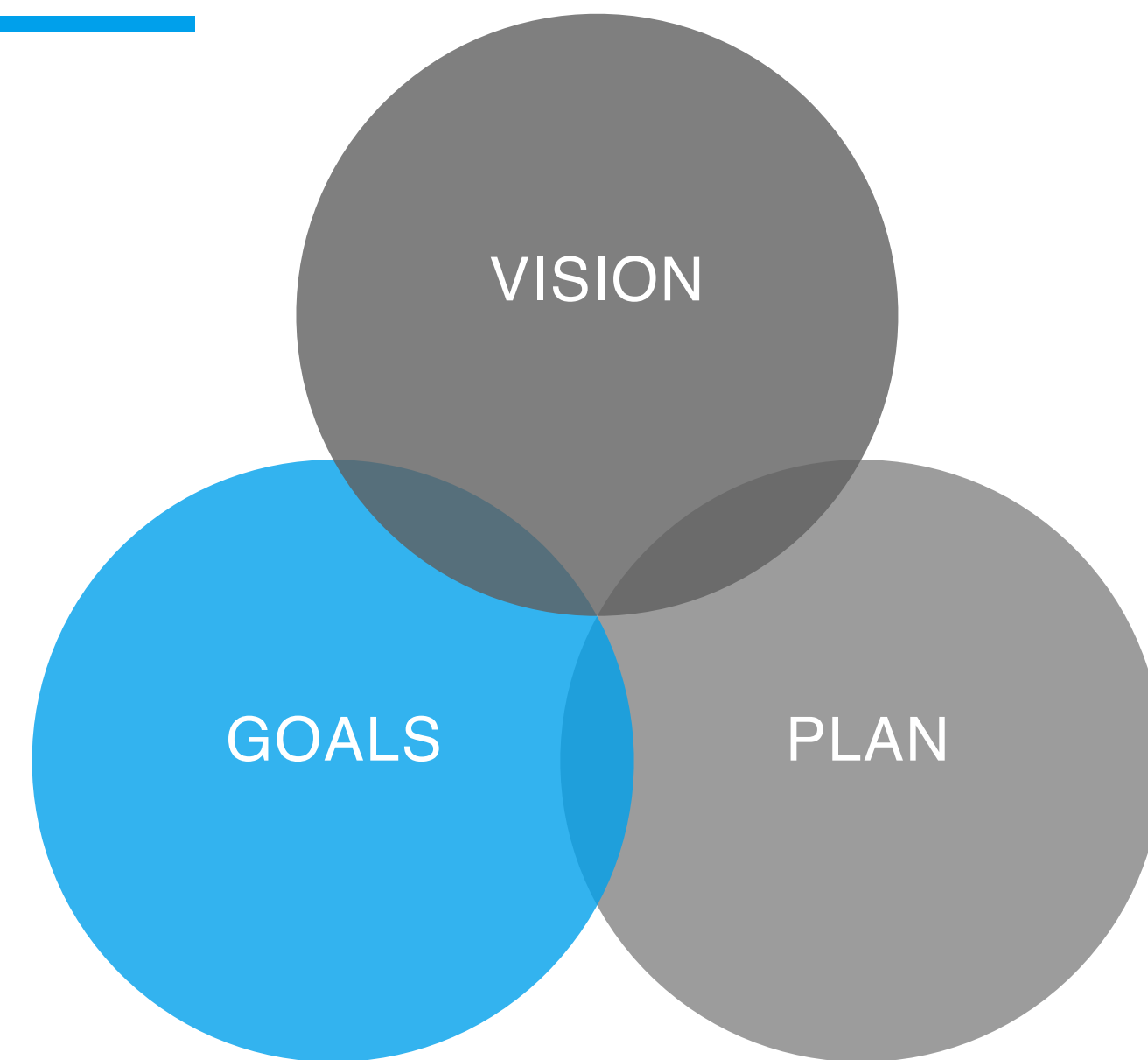
COACHING PROCESS & METHODOLOGY



PHASE 1

Don's helps financial advisors (our clients) succeed by supporting them to deeply understand and authentically serve their clients best interests (win-win). Don seeks to both unleash an advisor's greatest talents and to also bring additional ideas, strategies and creative ingenuity, to further foster their collaborative partnership and team work. This creates more consistent focus, systematic accountability and highly ethical workability, as they genuinely serve clients best interests with exceptional execution, leading to measurable increases in results.

COACHING PROCESS & METHODOLOGY (CONTINUED)



PHASE 2

After first understanding an advisor's basic vision and goals, we work to build upon previous accomplishments and optimize operational efficiencies, going forward, to free up valuable time and resources. We then focus on strengthening their value-added services, to elevate their client's experience. From there, we develop marketing, referral and center of influence programs, to create a robust pipeline of future opportunities that can be converted into results, while continuously improving their business management.

PHASE 3

Based upon what advisors have accomplished so far, what they most want to achieve next and why, we establish a compelling 2-3 year next stage vision statement and clear 90 day goals - usually their 3 top business and 3 top personal goals, with 2-3 priority actions steps each. As a result of every (typically weekly) 45-50 minute coaching call, we leave with agreed upon specific, building block action steps, that keep advisors moving forward and producing optimal results. We have a variety of templates and forms on file, for different purposes. We also help customize correspondence and marketing materials.

COACHING SERVICES PRICING

Realizing that different Financial Advisors and Wealth Managers may have different needs at different times, our “coaching gym” also includes the following:



24/7 E MAIL COACHING ACCESS

Allowing you to ask questions or seek feedback anytime and get an email response within 90 minutes.



SPECIAL CALL-IN DAYS

Easy scheduled, as needed, and huddle calls to heighten the pace and momentum of your implementation.



MONTHLY E MAIL NEWSLETTERS AND SPECIAL BULLETINS

With timely, take-away ideas and field testimonials to bring to your business.

I have worked to establish a reputation built on win-win agreements, exceptional service and a measurable increase in intended results. We meet, by phone, 3 times per month for 45-50 minutes, to set up and maintain your strategic focus. Consistent execution to achieve your most important goals and desired results is our primary focus for you.

We are committed to be a cost-justified resource to help you create business growth.

The investment for individual coaching is \$600.00/month.

(Teams/partnerships, \$1,000.00/month) Your success process is built upon your commitment to growth and the foundation of our weekly strategic sessions.



DonSardella
Transformative Results for Life & Business

Presented By: [INSTITUTE FOR LEADERSHIP DEVELOPMENT, LLC](#)

OUR LONG-TERM CLIENTS

20+ Years of Monthly Business Development Coaching Services with Financial Advisors and Wealth Managers



Financial Services Firms I have worked with include: Bank of America, Merrill Lynch, Morgan Stanley, Wells Fargo Advisors, UBS Financial Services, Citi Wealth Management, Raymond James Financial, Inc., Robert W. Baird & Co., HighTower Securities, LLC, Oppenheimer & Co., Van Kampen Investments, Zions Bancorporation, Commerce Bank Capital Markets Group, Cowen & Co. among others.

Other industries I have worked with include: Insurance Companies, Retail Automobile Sales, Government Agencies, Veterans Organization, Colleges and Universities, Non-Profit Organizations, Faith Based Ministries

For a more complete list, you can visit <https://www.donsardella.com/clients/> - thank you.

CREDENTIALS



Don constantly seeks to improve his skills in peak performance and has participated extensively with the Dale Carnegie's Center of Excellence, the Institute for Executive Development, Franklin Covey's Curricula, Robbins Research International, Zig Ziglar Corporation, Landmark Education Corporation, Coach University (Certified Coach U Graduate), International Coaching Federation (Professional Certified Coach), SmartMatch Alliances Certification Training and Toastmasters International (Advanced Gold Toastmaster).

Don previously served as National President for the Empowerment Resource Network. Don is currently an active member of The Society for Advancement of Consulting®, LLC. Don worked as The Director of Strategic Initiatives with Michael E. Gerber Companies, to help foster entrepreneurial leadership worldwide. Michael E. Gerber and the 25th Anniversary of E Myth has been recognized by the Wall Street Journal as a leading resource for small business owners.

Don maintains several additional professional certifications:

- Coach University (Certified Coach U Graduate) International Coaching Federation (Professional Certified Coach)
- Certified Performance Strategist – <http://www.performanceinsights.com/performance-strategists/>
- Paragon Resources – Certified Facilitator for Referral Builder System - <http://paragonresources.com/>
- Pryor Learning Solutions & CareerTrack, divisions of PARK University Enterprises Inc - Certified Trainer
- Franklin-Covey Certified Facilitator for Leadership and Management Courses
- Don also holds a Bachelor of Science Degree in Civil Engineering from Tufts University and has completed graduate courses in engineering and finance from Northeastern University.

