



thewisdomlink

# Integrating Leadership. Leveraging Knowledge.

To create a performance-driving culture, you don't have to go seeking solutions from the outside. Start by leveraging your company's own institutional knowledge - the best practices, insights and wisdom of your own people.

At The Wisdom Link, we blend professional services and technology into one seamless solution to harness and package the insights, best practices, and culture of an organization — and then activate that learning across the enterprise for measurable outcomes.

## **Drive Sales Performance**

Develop your sales process and add the training videos, tools, and resources to support your people on any device, anywhere, at any time.

## **Onboard New Hires**

Create a powerful first impression that includes fast-tracking a new hire into your culture, and towards operational effectiveness consistently, and more cost-effectively.

## **Train Vendors, Partners, Affiliates**

Manage a remote workforce with on-demand learning, a consistent training platform, reporting, customization, and connection for a high performance community.

## **Merge Cultures**

Drive successful M&A opportunities by lowering complexity, removing culture clashes, and loss of productivity by proactively capturing your best practices.

## **Manage Succession**

Create a roadmap to succession that includes consistency, continuity, and confidence for all parties with a knowledge management system that captures how, what and why.



# Our Solutions.



1  
PHASE

## DEFINE

We help define what makes your company unique and competitive. This one-day strategic planning day we call, the Innovation Lab, defines market, model, message and marketing.



2  
PHASE

## DESIGN

We then design a unique client experience that supports your entire company by using the critical path of your sales and fulfillment process as the backbone.



3  
PHASE

## DEPLOY

Finally, we deploy a scalable process that can be followed by all using our knowledge management software, PlaybookBuilder and our video interview process to harvest the best practices your team can execute.

## What Drives Us?

To empower high-performance, growth-oriented businesses by harnessing wisdom and unleash the potential of their best people.

## Who We Serve

Financial Services · Engineering · Insurance · Wholesale · Technology · Healthcare · Manufacturing · Retail · Professional Services

# Phase One **DEFINE**

Innovation Lab™

## One day. One focus.

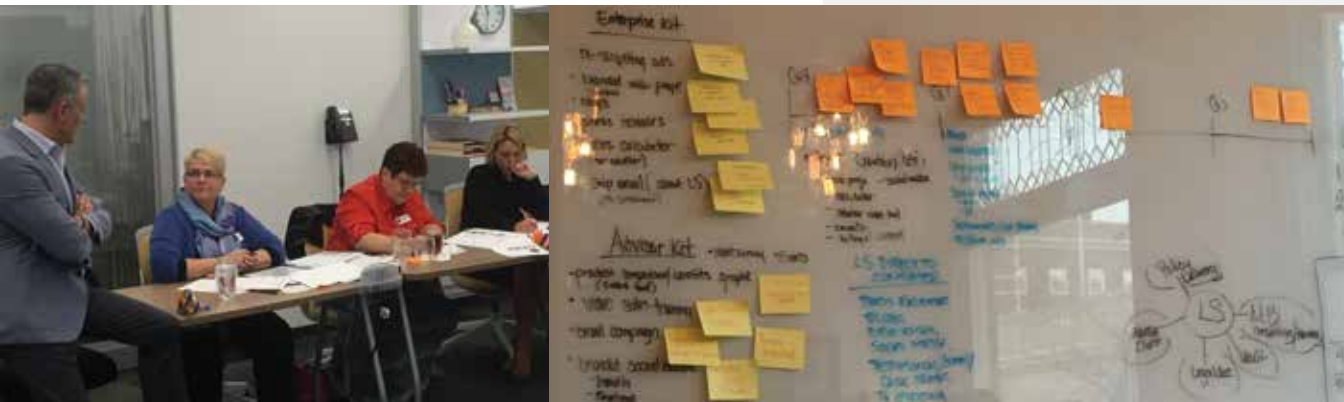
We've logged more than 18,000 hours of face-to-face consulting with some of the top minds in over 20 industries. Our Innovation Lab has helped hundreds of the leading business-owners from across the US, UK and Canada to better define their market, their business model, messaging strategy and market penetration options.

The Innovation Lab™ is a structured creativity day for your executive leadership team to solve for growth, market positioning, innovation and business model design. The objective is to deliver new clarity and an actionable plan. The outcomes are consistently exceptional.



### What you can expect:

- Clarity about your ideas and how they fit with your values and culture
- Structure for your endeavor that is aligned with your business goals
- Development of your ideas into audience targeting, financial modeling, message building and promotional concepts
- Timeline that provides an action outline of your next steps



## Testimonials

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We have put a lot of work into business development this year to re-tool our message, build out our capabilities, and increase our distribution. Our partnership with Jon LoDuca is the best investment we have ever made at Health Solutions. The energy of our team has never been this high and we are ready for fast pace growth.

- Sam Houston  
*EVP Business Development, Health Solutions, LLC*

ROI? In the first 90 days I would say the return has been 10 to 1. Our sales cycle is shorter. We closed three out of the last three of our clients and were able to do it faster because we were telling the story better. After a year, I expect our return to be 50 to 1.

- Ron Fuhrman  
*TrueNorth Benefits Division*

(The Innovation Lab is) a deep dive on clarifying the future vision of the business and marrying appropriate strategies to get there.

- Robert Morrison  
*Huber Financial*

The information that The Wisdom Link extracted really helped me recognize that we have something special. It crystallized that we have something of value. And I want other advisors to benefit from it.

- John Enright  
*Sagemark Consulting*

## Phase Two DESIGN

# Don't just tell what you believe. Show it.

Your philosophy, beliefs, and values are intertwined with the experience you create for your clients.

The Wisdom Link assesses your current Client Experience Process and takes it to a whole new level. We map the process from when a prospect becomes a client right through the sequence of experiences in an engagement, based on the niche you serve and the values you hold dear.



**Your new Client Experience Process then becomes the center of your business:**

- It informs how to position your company when you go to market, so your potential clients recognize your value and differentiation.
- It directs energy for key activities and company efforts
- It provides the guidance necessary for your entire team to serve your clients with your value system, consistently and in a scalable fashion.

## Testimonials

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The most valuable aspect of my Innovation Lab was candid, unbiased feedback. Jon calls BS on items and asks us to provide supporting evidence. The Innovation Lab either launches or kills a hunch so that one can focus on priorities. It gets you comfortable with being uncomfortable.

- Dan Pierson  
*Legacy Shield*

If you are an entrepreneur, you will never regret a minute spent with The Wisdom Link. Jon has a pure talent for harvesting the real wisdom that lives inside you. The Wisdom Link team will be one of the best investments you ever make in your business, but also an investment in yourself.

- Chris Horvath  
*SPG Financial*

I gained great confidence through Jon's exercises. The Wisdom Link helps you gain clarity to focus on what's important with an action plan to follow. Very powerful.

- David Allen  
*Departures Aviation*

This day has been phenomenal. I came here with a lot of wisdom but I've been stuck. Within one day with The Wisdom Link, I feel totally unstuck. I feel a new sense of passion and direction about where I am going.

- Tim Smith  
*Fairway Asset Management*

# Harness experience, insight and knowledge to transform results.

Playbook Builder™ is a unique knowledge management solution that combines professional services with a powerful video-based learning software.

Capture and leverage your most valuable corporate asset and competitive advantage...your company wisdom.



## **Make Learning Stick**

- Create powerful multimedia-rich learning content.
- Address different learning styles simultaneously.
- Create or load Videos, Screencasts, QR Codes, Documents, Flowcharts, and Links.

## **Track, Measure & Manage**

- Run usage reports for Teams, Users, and across your entire user Community.
- Identify training gaps, drop-off times and testing issues.
- Manage your people with raw data to drive performance and support HR.

## **Drive Adoption & Engagement**

- Create automatic email campaigns.
- Create deadline-driving alerts for new content.
- Drive community engagement with published video-ratings and viewership numbers.

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# About the Wisdom Link

Founded in 2002, The Wisdom Link helps high performance companies drive excellence, increase efficiencies, and build cultures of accountability by harvesting their native wisdom and leveraging it within our Playbook Builder software.

Blending this learning management software with our robust professional services, The Wisdom Link provides a unique framework ‘The Wisdom-Driven Enterprise’ that provides a seamless solution that combines the wisdom, best practices and an organization’s culture — then activating that learning across the enterprise for measurable results.

We focus on results that can be tracked, measured and scaled. And unlike others in the “learning” or “training” space, we believe accountability to outcomes is the critical element for any performance enhancement endeavor and orient our entire organization (software and services) around results that can be quantified and made predictable.

We’ve empowered hundreds of top-performing small and medium sized companies in 40 countries and over a dozen industries to identify, package and monetize their Intellectual Property and are proud of the results.