



trainer to top producers



John DiMonda

Managing Director Northeast
and Midwest Regions
**Lincoln Financial,
Sagemark Consulting**

The Wisdom Link supports many producers in the financial services arena and understands the changes in the industry, the shifts in the economy and the problems advisors face in the 21st Century. Because of our experience serving the top advisors in insurance, money management and financial planning, we've acquired an interesting insight into the particular challenges in each focus area. Despite this fact, we are always surprised by the expertise and insight of our remarkable client base. The breadth of wisdom and the insight of the veterans is always enlightening and educational. One such client is John DiMonda.

John is a highly accomplished field executive for Lincoln Financial, Sagemark Consulting. As Managing Director responsible for metro N.Y. and N.J. as well as the Midwest regions, John is tasked with driving revenue, recruiting representatives to the organizations and coaching the top producers on how to be more effective and resourceful. John's been very successful himself; his group consistently tops the field for results, the organization's top producers are coached by him and John has accrued a litany of accolades from his peers. With his proprietary coaching program, The Strategic Practice Navigator™ he's established "practice management guru" status inside of Lincoln and a personal brand that carries weight across the marketplace.

“ You took my wisdom from my head and linked it to a process that was alive and breathing when it was complete. That gave me tremendous confidence. ”

challenges

RESULTS

John coaches over 40 producer groups and needed to maintain results for each. He wanted a process that mapped to the producers' existing client-engagement process but handled the back-stage elements to deliver.

RECRUITING CHALLENGES

With so many programs available to John's producer recruits, he needed a strong hook to differentiate. John was facing widespread commoditization in the industry and couldn't rely on the services and products alone to attract talent. He needed a packaged program of training to gain a competitive advantage.

TIME

John lacked the time to develop and package his coaching program. He knew he had it in him but couldn't get it completed alone. With two of the nation's biggest regions and well over 40 practices he directly manages, John had little time to work the project without assistance. He needed a team that could pull out his wisdom and take the project to the next level without needing a lot of hand holding.

FOCUS

John was too close to his own knowledge and lacked the ability to get the ideas out. He'd accrued over 20 years in the industry and grown so accustomed to what he knew, he no longer knew if his ideas were commonplace or revolutionary. He needed an outsider to provide independent perspective and fresh insight.

actions

EXTRACT THE WISDOM

We took John through a series of steps in our process, The Capital Creation ApproachSM to refine his understanding of the audience he served, the needs they had and the solutions he'd built. Once we'd refined his Wisdom PlatformSM it became a lot easier for him to decide what would need to be in the program and what would need to be left out.

DEVELOP THE PROTOTYPE

We created an outline of the program for John that helped him see each step of his process outlined with all the moving parts and tools laid out. This deliverable was critical to John who had assembled lots of materials over the years and need to see them operating in concert with clarity about their purpose and focus.



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“ We’ve put something out in the marketplace that is a huge differentiator. No one can compete with it. More specifically, it put my stock up higher in the marketplace because I’m the guy who built this. I’m the one who heads up The Strategic Practice Navigator™.”

DESIGN THE PIECE

Once we were on the same page with John, he turned us loose to name the process, draft the copy and design the graphics of his program. We needed to keep John’s particular style and his market in mind so he could take it to his producers and recruits and they would see John in it.

EXTEND THE BRAND

The process was essential but it wasn’t the extent of John’s needs. Once we’d built a platform of design with the first brochure for his process, we were tasked with building a website, seminar materials and the program’s many tools and forms.

results

PRODUCER RESULTS

John’s regions are consistently the top producing for four of the five previous years and the company’s top advisors are coached by him using The Strategic Practice Navigator™. John’s producers have effectively weathered the storm of the economic collapse and are back to fighting strength again due in large part to his program.

RECRUITING RESULTS

John reports significant response from his recruiting efforts. He tells a story of sharing his approach with two recruits who were so impressed they asked how much it cost. John’s reply, “You get it as a value add when you work for us.”

DEVELOPMENT OF BRAND

John’s program has positioned him as the “practice management guru” inside all of Lincoln Financial. He enjoys visibility inside and outside the company and is building a powerful reputation among his peers which gives him options and control over his future.

A SCALABLE, TURNKEY AND SYSTEMATIZED PROGRAM

John has a full-fledged coaching system that he can grow with and deploy consistently because it comes from his own wisdom, his experience and not someone else’s. He owns this IP and has the potential to roll it out nationally and internationally as he sees the market gain readiness.

review questions

1. How could your team benefit from documenting systems and procedures?
2. In what ways would tangible tools aid you in communication?
3. How could a predictable source of revenue aid your business?