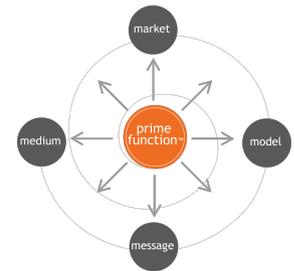


wisdom - driven™  
wisdom-driven

wisdom link services



Prepared for Ron Fuhrman, Brent Matthews, Josh Budke  
February 6, 2018



## OUR GOAL

# Re-engineer the **Benefits Navigator** process

*packaged & collaboratively leveraged*

### Our MAIN GOALS are to:

1. Create a unique “discovery” experience – a comprehensive and multimedia-rich client experience to better unearth insights about the organization and to better create an overall impression of what is and what isn’t working.
2. Create sales, proposal, and marketing to promote this new program
3. Develop the Unique Process for the entire engagement
4. Build a robust team training so we can – internally– deliver this process

What's invisible, silent, and  
untouchable, yet so powerful  
it's your most valuable asset  
and competitive advantage:

[wisdom]  
**your wisdom**

# what's next

## It's not real unless it can scale.

The process of transforming wisdom into powerful communication tools refines and improve its' effectiveness, protects and enhances the value, and allows it to become transferable to a wider audience.

We offer a full spectrum of services to **leverage your wisdom and build your solid platform.**



# capital creation



Transform decades of your experience and wisdom about your unique sales process into a permanent company asset, market positioning tool and team training resource.



Our Capital Creation Approach™ has helped hundreds of successful entrepreneurs in the US, Canada and the UK to capture and package their most important sales conversations into a graphically enhanced communication tool.

# brand insight



Define and develop the very core of your company value proposition and the name, brand identity materials, and positioning strategy to promote it.

Our **BrandInsight™** process examines a deeper spectrum of information to get beyond the clichés to extract a thoroughly unique and authentic expression of your company's value.

# tool builder



Additional Services

ashion financial

**BIG BOX**  
accounting shops  
HOW THE 'BUSINESS OF NUMBERS' CONFLICTS WITH THE NUMBERS FOR YOUR BUSINESS.

3 Step Three: Confidence  
Select the route.

2 Step Two: Capability  
Determine the foundation.

DOES YOUR INSURANCE GET A CLEAN BILL OF HEALTH?

TRUE NORTH  
Investment Counselors

truenorthcompanies.com

The CFP Advantage

The Experience Overview

COMPOUNDHEALTH FINANCIAL PARTNERS, LLC

Define and develop the very core of your company value proposition and the name, brand identity materials, and positioning strategy to promote it.

Our **Tool Builder Program™** transforms your thought processes, problem solving exercises, and thinking tools into powerfully packaged company assets that enable scalability and increase valuation.

Leadership in the right direction.

TRUE NORTH  
Investment Counselors

Ad remte publicus cubis, sentia vocatum diem vens omplace inthea dio, Casu etta mozio Cas le cotans maeta, publisent?

# playbook



align team culture,  
train team members,  
and protect your  
company from  
the loss of key  
employees with  
**Playbook Builder™.**

Our web-based e-learning platform and professional services engagement begins with an onsite interview to harvest your wisdom through video, flowcharts and written tools housed in a secure training vault to share with invited employes, partners and affiliates.

# investment

## PROJECTS

PROCESS MAPPING – Tech, Compliance, Benefits, Communication Processes, Strategy

\$15,000

TRAINING – Create training videos for all specialties (30+ videos per team) for the PlaybookBuilder training

\$10,000

PACKAGING – Create the communication materials to sell and deliver

\$30,000

- Unique Process
- Team Onsite Prep Materials (Surveys, Invites, Outlines, Prep Kits, Orientation Videos)
- Proposal 1 and 2 PPTs
- Results Deliverables
- Oversee the Documentary Film Team

# investment

## TERMS

Based on a 90- Project Plan with 180 - day payment schedule

Month	Staggered Payment	Short Payment with 10% Discount
FEB	\$7,500	\$20,000
MAR	\$7,500	\$20,000
APRIL	\$7,500	\$9,500
MAY	\$7,500	
JUNE	\$7,500	
JULY	\$7,500	
AUG	\$4,500	

\*Playbook Builder Software:  
\$120/mo.

Travel costs not included

# next steps



**Thank you!**

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**We are honored to be working with you!**

**The Wisdom Link, Inc.**  
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 **thewisdomlink**  
an intellectual capital development firm