



Program Abstract

Team Leader Certification Program

Teams are critical to the success of an organization. Lack of alignment, conflict, differing degrees of commitment, low accountability, confusing roles and responsibilities, etc. all impact the harmony and profitability of a team. This program was created at the request of top leaders who wanted practical training on how to effectively lead a high performing team.

Our program

In this interactive program participants will:

- ✓ Learn how to create ownership and urgency from team members
- ✓ Practice coaching skills to bring out the best in their team
- ✓ Explore ways to create positive accountability
- ✓ Interact with a model for dealing with conflict and difficult performance discussions
- ✓ Learn how to manage their time and the team's time
- ✓ Practice a method for creating a clear and shared team vision
- ✓ Study proven methods for helping team members deal with change
- ✓ Learn how to leverage different styles on their team
- ✓ Create a process for aligning the team's core beliefs
- ✓ Define ideal clients for the team
- ✓ Build an positive client experience process and advice model
- ✓ Refine their client service standards
- ✓ Practice a process for defining roles and responsibilities
- ✓ Develop a process for team communication

The process

All participants will go through the following process:

- ✓ An intensive two-day boot camp studying and practicing the above
- ✓ Participate in two months of follow-up coaching
- ✓ Pass a certification exam that requires them to show that they have done all of the assignments necessary to receive the TLC certification

Participants will leave this process with the skills and processes necessary to create accountability, positive morale and phenomenal results.

Your Instructors/Coaches

Tim Ursiny, Ph.D., CBC, RCC

Dr. Tim Ursiny, founder of Advantage Coaching & Training Inc., is a speaker and certified business coach specializing in helping individuals reach peak performance and life satisfaction. His areas of expertise include communication skills, team building, confidence, coaching skills and dealing with change. He has written or co-written 11 books including “The Coward’s Guide to Conflict” which is in its fourth printing and has been translated into multiple foreign languages. His most recent book is “Tough Times Tactics”. Dr. Tim is a frequent speaker on a variety of topics that benefit individuals in the workplace and personal life. He has spoken for firms such as Wells Fargo Advisors, Raymond James, Morgan Stanley Smith Barney, UBS, INVESCO, Guggenheim, LPL, and First Trust Portfolios. Tim has been interviewed and appeared in The Bottom Line, The Chicago Tribune, People Magazine, Readers Digest, First for Women and other periodicals. He has also appeared on CNN radio news, VH-1 News, Total Living and ABC Channel 7 News. You can reach Tim at Advantage Coaching & Training, Inc., 480 East Roosevelt Rd., Suite 105, West Chicago, IL, 60185; phone: (630) 293-0210; email: drtim@advantagecoaching.com

Susan Kornegay, CFP®

Susan Kornegay founded Pathfinder, Inc., in 2009. Based on the five component parts of Purpose, Clients, Support, Planning and Growth, she provides a step-by-step, guided approach to help advisors create or refine their own vision for their client-focused advisory practice and then turn that vision into reality.

Susan began her career as a Financial Advisor at Dean Witter Reynolds in 1984, earning her Certified Financial Planner™ certification in 1987. She was a financial advisor for 14 years, including three years co-leading a \$1.2 million team.

After six years as a branch and complex manager, Susan moved to Wachovia Securities’ home office to help start the Practice Management Consulting Group. As the Director of FA Best Practices, she led the development of many programs and resources in support of advisors including the Practice Management website, the advanced FA development program, and the annual Business Planning program. She also created and published the FA Guide to Teams and led the firm’s FA Teams Initiative.

Susan joined Loring Ward in 2007 as Managing Director of Practice Consulting, where she developed the Structured Practice website, led their advisor conferences and forums, and provided individual consulting to independent advisor-clients.

Contact information

For further information on these sessions feel free to contact us at Advantage Coaching & Training, Inc., 480 East Roosevelt Rd; Suite 105, West Chicago, IL, 60185; phone: (630) 293-0210 x 102; email: info@advantagecoaching.com.