

CREATING **SUSTAINABLE** SUCCESS FOR LEADERS AND TEAMS.

For decades, The Collaborative has helped clients overcome obstacles and reach higher levels of success using our unique blend of customized program development, training, and coaching.

Our forte is understanding people—how they think, how they communicate, and most importantly, how they can make lasting change happen. We put that expertise to work for our clients with unrivaled passion and a focus on obtaining superior RESULTS in everything we do.

Operating from a vast pool of human behavioral insight—the knowledge of how people make shifts toward effective outcomes—and with on-the-ground experience, we help our clients achieve their goals. We've spent decades in C-level positions, running companies and divisions, so we know the business challenges first-hand.

TOOLS FOR GROWTH

Tools that help financial services firms grow faster and add more profitable clients.

SALES EFFECTIVENESS

Resources for telling your brand story and turning your team into a sales machine.

CORPORATE TRAINING

Learning opportunities that provide the skills you need to effectively serve your clients.

CAREER DEVELOPMENT

Proprietary solutions that help firms get the right people into the right positions.

Our deep combination of empathy and experience allows us to:



Offer Fresh Solutions

Our clients require answers to otherwise baffling challenges. We satisfy these needs using proprietary behavioral analysis tools and our real-world experience with thousands of clients to offer customized solutions.



Solve the Right Problem

Clients commend us for solving their *real* problems, not just the ones they bring to us. We listen to their desired outcomes and understand their obstacles. We analyze the situation, identify underlying issues, and help them put action-oriented steps in place to move forward with confidence.



Customize Approaches

We recognize that what works in one environment won't work in another. We apply proven methodologies and tailor them to fit the individual client company, team, or situation.



Build Long-Term Relationships

Our clients appreciate what we do so much that they hire us again and again to help them accomplish new objectives and goals, and to become more and more effective over time. As teams evolve, they continue to turn to us for answers and new paths to success.

Our Services

- Customized program development (on institutional platforms for advisor clients)
- Individual and corporate coaching
- Team building and facilitation programs
- Corporate identity creation (including website design, marketing collateral, and presentations)
- Public speaking and seminars





Let us help you navigate the path to greater success. Visit us at the-collaborative.com or give us a call at 508-359-8216

"On a scale of one to ten, The Collaborative has been a ten to work with. They helped us slow down and identify the areas that we really needed to concentrate on in order to take the next steps in our firm's growth. They are exceptionally adept at creating solutions they think will work for you, and more importantly, solutoions they think you can handle... I have enjoyed working with The Collaborative and look forward to continuing to do so."