



Performance
Systems
& Associates, Inc

Levelbreaker Coaching

Succeed. Faster!

Break through to the next level.

The PSA Advantage

Achieve Results

Build your Team

Share your Leadership

You **can** have it all!

Maximize Your Natural Talents

Every professional hits a plateau (or “level”) at some point. The Level Breaker Program© eliminates that ceiling. We help you break through the glass ceiling and achieve your full potential. We know that each individual is unique so we've designed a modular system that is tailored to meet your specific desires, needs and goals. We can help you achieve the following:

- Build a system to consistently achieve your personal and business objectives
- Build a high performance practice and/or team for scaling your business
- Reduce stress and improve any and all relationships
- Develop strategies that shield you from market conditions.
- Improve effectiveness by using latest understanding of psychology to improve sales, motivation, team productivity, communications and leadership.
- Achieve higher levels of success by building a team approach to maximize your natural talents enabling you to focus on what you do best.
- Create a holistic strategy to achieve professional success, without sacrificing your health or relationships.
- Implement the strategies and changes to build a high performance culture
- Build an Exit or Succession Plan to leave your business on your terms, when you want, with what you want.



IN THE WORDS OF OUR CLIENTS

“Paul helped me remove the glass ceiling I placed on my potential. He is an "out of the box" thinker and a relentless learner. Paul delivered the world of possibility to me and helped double my production over a two- year period. He guided me toward finding my blind spots, laying a foundation that has been with me for the past 15 years. I have addressed my peers on several occasions and he is almost always mentioned as the man who opened my eyes to what I am really capable of. Paul is a true professional!” ---**Jeff Photiades, Wealth Advisor NML CLU, ChFC, LUTCF**

Your personalized “whole person” Level Breaker© coaching system has had a great impact on me personally by helping me integrate my business vision, mission and personal goals, something that I believe is unique and usually missing in the life of many advisors and small business owners. The depth and breathe of your guidance and experience has helped me build my team and the infrastructure necessary to support a referral only practice. --- **Jay Edwards, Advisor, GFS, CFP, CLU, ChFC, AEP, AIF Granite Financial Partners, LLC**

“Paul you are one of the few coaches I have met who truly understands all the pieces to building and sustaining a high performance financial services practice. Over the past two years you helped me fine tune my marketing, referral sales process, build my practice infrastructure and develop my support team. Your Level Breaker™ coaching program has helped me take our business to the next level by implementing Best Practices models for Sales, Marketing and Client Development. Thanks, --- **Gerald Radican , Financial Advisor, CLU, ChFC, CLTC” Mass Mutual**

Paul’s process focused coaching style has truly helped me take my business to the “next level”. He has helped me implement systems that will allow my business to grow year over year. The nice thing is while we have implemented systems for scaling the business and creating a referral only practice, his immediate impact cannot be understated. Since working with Paul my production has increased by 300 %, and I’ve already beat my best year ever, with 3 months remaining. His focus and awareness of the client trust building has helped me improve performance, client satisfaction and referrals. I would highly recommend Paul to anyone who is truly committed and passionate to being their best” --- **Kyle Sanders, Advisor, CFP, Foresight Financial Management**

“Your background in the computer industry and your commitment to human behavior has put you in a unique place to provide real value. Although I have been a top agent for NML you have enabled me to break through to yet another level of productivity. The most important part is that you helped me do it more effectively which has enabled me to reach my lifestyle goal as well.”

--- **Greg Telge, MSFS, CFP, CLU, ChFC, REBC, AEP Advisor, The Telge Companies**

Knowing is the first step.

How do you know if you're ready to move to the next level? If you recognize yourself in some of these statements, it may be time to take action.

- You were a high achiever, but now you're having difficulty meeting your objectives.
- You need help building your team, systems, and processes.
- It's getting more and more difficult to sustain motivation
- You want to reach beyond your current level of performance.
- You're working harder, not smarter, but you don't know what to do about it.
- You need help building a referral-based business
- You want to develop a team approach, but you're not certain you have the right people.
- Your business is getting more complex, and you need to simplify.
- You need help developing and implementing a marketing plan that works.
- You're relatively new to sales and find it difficult to stay focused and motivated.
- You've achieved your career goals, but wonder if the sacrifices have been worthwhile.
- Your priorities have changed due to personal events: births, marriage, divorce, health, death.
- Your environment has changed. You feel detached, as though you're falling behind.
- You're achieving your goals but enjoying it less - you're tired - there must be a better way.
- You want to make more effective use of your time.
- You want to combine your personal and professional objectives.



**Focus on the solution.
Take the next step.**

GET TO KNOW US



You are truly one of the few coaches who understand how to deal with the complexity of building a high performance business practice and life. The depth and breathe of your guidance and experience has helped me build my team and the infrastructure necessary to scale our business.

----- Jay Edwards, GFS®,
ChFC®, AIF®, CFBA, CFP,
CLU

Paul B. Scaffidi is one of America's leading coaches for building high-performance teams and organizations. A former UCONN Husky Football Player he swiftly rose up the corporate ladder from account executive to Vice President of Sales for two Fortune 100 companies as he and his organizations consistently achieved results and breaking records for performance.

He recognized very early in his career the power of teaming for scaling his business, optimizing his resources to build his client base and territories. Today, his focus is on helping advisors, owners and leadership build high performance teams by attracting and selecting the right people & providing on-boarding, coaching and development support.

What makes Paul unique is his programs come from both his practical experience as a successful sales professional, manager, executive and entrepreneur and his dedication to continuous improvement learning and improvement.

PSA Services Include:

The Level Breaker System © - a holistic and personalized coaching system for leaders, managers, advisors and teams .

The Practice Optimization Program - provides leaders and advisors with the tools and process for upgrading and improving their practices and teams.

Talent Acquisition - from role definition and job requirements to attracting and recruiting we improve selection and retention by developing customized candidate profiles which include: Behaviors, Values, Motivation, Competencies and Potential.

The Dream Team Program© - this program includes all the pieces for building your Ideal Team and Lifestyle. Includes: Vision and Architecture, Structure, Position Modeling, Candidate Assessment, On-boarding, Training and Performance Management.

The Client Focused Advisor program - a modular "consultative" sales program for developing a high performance sales organization.

Build your business and lifestyle.

Successful People and Top leaders share some a number of distinct qualities.

They know that they don't know everything. They seek expert help. They listen, they continue to learn.

They are often visionaries, strategic thinkers which enables them to achieve multiple results, build systems and teams so they can achieve their both their Business and Lifestyle objectives.

Their:

- Vision and purpose driven
- Intensely Goal Oriented
- Strategic Thinkers
- Excellent at selecting the right people
- Natural Team Builders
- More Accountability
- Risk Takers
- More adaptable
- Perfectionists

Outside of a few, like Steve Jobs, have all of these characteristics, competencies or traits, which is why the team approach is so powerful when implemented correctly. It's tough to find these qualities in the average person unless they have a system and the tools and guidance to make it work.

The old model of failure many times is good, has some profound truth and used to be a gold standard. Today, you need to do it right much faster, do to higher expectations and

Unfortunately, something always suffers, be it marketing, personal health, relationships. or revenue.

We understand the challenge and the impact it can have on your quality of life.

Change is very challenging for everyone. We are creatures of habit, a necessity to our survival.

Changing habits means changing patterns of behavior, from communications to sleep habits.

A team typically has a variety of personalities. Each type, based on the most universal model used today indicates (4) Dominant Styles. Each style has its strengths and weaknesses. They also have different patterns of communications, some very direct and others implementing change has on the bottom line, the people you surround yourself with and the clients you serve. and have the tools and experience to insure you build the best strategies and tactics for building a scalable referral based business.

We accelerate the attainment of your Ideal Practice, and Lifestyle.

Build your Ideal Team

These are only a few of the options available through the Level Breaker Coaching System.

THE 7-STEP LEVEL BREAKER PROCESS

1. Create or refine your **Personal Strategic Plan** to include your vision, mission and goals. This is where we help you identify what you truly want your business to represent and accomplish.
2. Develop or refine your **Strategic Business & Marketing Program** where you integrate your business vision, mission and goals (Business) with your Personal Strategic Plan. (Lifestyle)
3. The **Practice Assessment Process** is where you look under the covers and review your current situation, including: your current systems, sales process, marketing, operations, staff/team, technology and habits/rituals.
4. The **Strategy Development** process is where we help you put it all together. We'll look at all your options, identify any potential roadblocks (business and personal) and create strategies to fix them. This step is where you create your **Implementation Roadmap** for building your business. We'll help you develop and improve your selection and hiring, sales process, team roles and responsibilities, performance management, tactical marketing and time utilization.
5. The **Implementation Process** is where you develop specific action steps and benchmarks. We'll also help you devise measurement and reporting processes so you can easily stay on course.
6. The **Execution Process** is tactical and quantifiable. This is where we all roll up our sleeves and jump into action to achieve the results you identified in Steps 1 and 2.
7. The **Accountability Process** integrates Coaching and Project Management to provide you with accurate weekly, biweekly, monthly and/or quarterly feedback. This is instrumental for you to stay on-course with the strategies, processes and goals you identified throughout the 7 Steps.

Your personal strategic resource.

Think of PSA as your Personal Strategic

Resource, your Brain Trust, Marketing team, and source of performance tools.

Our objective is to help you and your firm:

- Solve problems
- Reach goals
- Identify Action Steps
- Make better decisions
- Develop and implement a plan of action, working through changes and obstacles
- Maintain a healthy balance between your personal and professional life
- Keep looking ahead to take advantage of new opportunities
- Bring out your personal best, keeping focused on your needs, values, and vision

As your Personal Strategic Resource we will:

- Hone your vision
- Keep an unwavering focus on your goals
- Hold you accountable
- Always have your best interests at heart
- Be on the lookout for your health and well-being
- Give honest, constructive feedback

The results you'll see include:

- Increased productivity
- Enhanced work habits
- Better balance
- More free time
- Achieving your full potential
- Greater fulfillment

As your Personal Strategic Coach we take on the following roles to help you:

STRATEGIST—We facilitate personal growth by providing big-picture insight, tools, feedback and coaching.

COUNSELOR—We help you accurately describe issues affecting your life and business and then work through those feelings in a process that is productive, positive, and supportive.

CHALLENGER—We challenge or confront your performance ability and then help you implement strategies to improve those deficiencies.

ACCOUNTABILITY PARTNER—We play the role of project manager and accountability coach so the goals and tasks needed to be accomplished get completed on time and within budget.

Questions and Answers

What kind of results can you expect to achieve?

Follow our lead, and your income should increase between 20% and 30% in the first year! Additionally, you'll see your personal time and health increase dramatically.

Those results are possible because you'll build a plan that is based on YOUR goals and priorities, driven by YOUR values.

Thus, you'll simplify your life, increase your focus, become more productive, strengthen your team and client relations. In addition, members in the Level Breaker Program(c) usually experience many positive changes in their personal lives through better alignment, communications and self-management.

The Level Breaker Program™ integrates life coaching and business coaching by helping you combine all your activities into one overall vision and plan for your life.

What is the Level Breaker process?

You get started by developing your Personal Strategic Plan. This plan acts as a guide and enables you to make better choices and decisions. Once completed, the next step is to develop and/or refine your Strategic Marketing Program. Meanwhile, you'll complete the Business and Personal Assessment process.

This process enables us to find immediate opportunities for increasing your production and personal time. Then, we develop your Implementation Plan to build your markets, relationships and/or improve your business.

In the last step you focuses on accountability with a variety of support options, including weekly, bimonthly or monthly coaching meetings and quarterly on-site meetings. This maximizes improvement of you and your team. You'll find that your key projects and initiatives are then completed on-time and within budget.

How much time should you allocate for the Program?

The bulk of the time will be expended in the first 90 days, as we build your Ideal Lifestyle and Business Plan. This will typically take about 1 hour per week. Once we have the plan developed and organized, we'll meet twice per month, on the phone for a 45–60 minute coaching session.

How long is the Program?

The Level Breaker Program™ was designed understanding the challenges of implementing change while attending to the day-to-day requirements of running your business. We know that change is not easy which is why the levelbreaker program requires a 12 month commitment.

The initial year creates the foundation that allows you to achieve increasing results for the rest of your life.

What other resources are available?

The Level Breaker Program includes access to the Level Breaker Toolkit. This is a treasure trove of resources for personal and professional development. These tools include sales resources (letters, surveys, scripts, referral tools), marketing tools, team development tools, selection tools and leadership tools. We also provide a variety of tools for personal development for your family.

What happens if you can't attend a scheduled coaching call?

Emergencies happen, and while we cannot offer refunds for missed sessions, we will do our best to offer rescheduling options.

What other commitments, if any, are expected? both personal and professional. A commitment to full engagement is critical to growth. Completing assignments and recommended reading/listening are important ingredients which will enable you to see the best results from the Level Breaker System.

Other questions?

Call or write:

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LEVEL BREAKER SYSTEM

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