

The background of the entire image is a sunburst pattern consisting of numerous light gray rays radiating from a central point, creating a sense of energy and expansion.

**THE  
POWER  
OF  
PEOPLETIZING<sup>SM</sup>**  
**NETWORKING YOUR WAY TO AN ABUNDANT LIFE**

**CHAD COE**



THE POWER OF PEOPLETIZING  
Networking Your Way To An Abundant Life

Chad Coe

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“When I first met Chad, he immediately invited me to come to his office and visit. Early on he trusted me and gave me a list of his friends to contact. Chad is always thinking of ways to bring people together and to help them to succeed. Since that first meeting, he has become a client, a business partner, and a friend. I know him to be a man of charity, a man of integrity, a man of his word. Chad is a highly creative individual who is constantly working to better himself and to better the lives of the people around him.”

Amy Spitzer, President  
Amy On Call, Inc.

“Chad Coe is the type of coach that any professional would want in his/her corner. He is also the quintessential networker ~ magnetic, inspiring, and proactive. He obviously enjoys bringing people together for enterprise and partnership. Chad is also a man of boundless benevolence who demonstrates a true sense of charity and pay-it-forward.”

J.D. Gershbein  
Owlsh Communications

“The essence of Chad Coe is his positive energy, integrity and sincere interest to unify people and improve their lives. He is open minded, a great collaborator and a natural leader that makes things happen. It’s easy to like Chad. He is the genuine article. He will go out of his way for you. I trust him like him like a family member.”

Rob Miller  
Job Plex

*“Life is like a combination lock; your job is to find the right numbers, in the right order, so you can have anything you want.”*

*Brian Tracy*

*“If we did all the things we are capable of doing we would literally astound ourselves.”*

*Thomas Edison*



## Dedication

To Geoffrey, Jordan, and Zachary, My Children  
I love being your father!

To My Valued Clients and Colleagues  
Thank you for your trust, friendship, and affection.

Dedicated to all my networking friends!



## Definition

### **PEOPLETIZING**

Linking people through thoughtfulness, caring, sharing, and mentoring; a genuine, strategic, compassionate way of connecting people that works to everyone's advantage; building relationships in order to purposefully help one another; acknowledging and learning about people informally in order to avoid the "dance" of cold selling.



## **Introduction**

Why, you might wonder, would I—a financial advisor—write a book?

I write to share my excitement about a philosophy called PEOPLETIZING—a philosophy that has helped me create a life I cherish, a life in which I am able to make a difference in the lives of others.

*“The more people I help, the better I become.”*

*Chad Coe*

PEOPLETIZING is a life philosophy that developed as I built my business and founded a children’s charity. PEOPLETIZING is about investing in relationships in all areas of life. It’s about getting to know people. It’s about developing mutually-helpful connections that allow everyone involved to capitalize on the talents, skills, and abilities that create great businesses, generous not-for-profit organizations, and loving families.



The adults who helped me through a childhood defined by learning disabilities were sowing the seeds of my PEOPLETIZING philosophy long before I articulated its concepts. I started from a place where I always had to try harder and work harder—and not give up—and so I know that it's beliefs, not events, that shape our lives.

Countless people contributed to who I have become. Even now I continue to discover that every day is an opportunity to help others—and that who you are is more important than what you have.

To life—and to PEOPLETIZING!

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# Chapter 1

## PEOPLETIZING Emanated From My Early Struggles

If I can make it, anyone can.

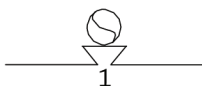
Make what?

A life that is, most of all, balanced and fulfilling.

Yes, if I can make it, anyone can.

### **A rough start**

Attention Deficit Disorder would have been my label. But at that time, there was no formal or specific diagnosis. I was in “Special Education”—special schools for kids with special needs. No homework. No tests. Really, just custodial care. My days were filled with playtime. I was



disorderly—sometimes even wild—and I never felt like I was learning anything. I was very outgoing and desperately wanted friends, yet felt like I didn't fit in. In addition to fact that I didn't go to school with the kids in my neighborhood, my family frequently moved and peer connections were few and far between.

### **Mainstream school**

Just before I was scheduled to start 4th Grade I broke my leg, and was in the hospital for 6 weeks. When I started school, I was on crutches—not exactly the initiation to mainstream academia I was hoping for. Although I was “mainstreamed,” school was difficult. I was enrolled in remedial programs and everyday I received one-on-one help. In the school library, dedicated adults worked with me on reading, math, and writing.

*“Having the support of others was a wonderful way to overcome my difficulties.*

*That experience colored the way I do everything.”*

*- Chad Coe*

## **Life changes**

When I was in 7th Grade my parents divorced, and my brother, sister, and I went to live with my Dad. While I was often the class clown and frequently involved in playground fights, it was during those transition years that I began to develop a greater sense of self and function independently. I took care of myself; I got where I needed to be by hitchhiking or riding my bicycle. I realized that

I was going to have to work hard and take nothing for granted. Perhaps my greatest discovery was realizing that when I was challenged, I did better in school!

## **High School—and an important meeting**

High school provided more than academic lessons. I also played on the tennis team. The lessons of tennis are still with me today: focus and strategy are paramount to succeeding, winning, and getting what you want. Tennis also gave me friendships—and a sense of belonging.

At 16, I started working, took college entrance exams—and, best of all, met Debbie (my future wife). I started a window washing business and worked as a caddy when there were no window washing jobs. The CEO of Bally's Gaming was the first person I caddied for—he took me under his wing and taught me the fine points of caddying. To this day, I still can't believe how nice he was to me!

In a video arcade, I met Debbie and liked her immediately. We became great friends and dated throughout high school. Rather than noticing my deficits, Debbie offered me support and understanding. She saw my potential,

and was always patient with the indecision that surrounded my career aspirations. Little did either of us know that we were creating a foundation for a beautiful life-long partnership.

I also took my ACT and SAT tests. No great news here (ACT Score: 13 out of 36; SAT Score: 720 out of 1600) yet I found my way to Parkland Junior College in Champaign Illinois, and then transferred to the Business School at the University of Illinois where I completed my Bachelor's Degree.

### **College days and early work**

During college and after, Debbie and I engaged in a variety of small business ventures. Each was interesting and exciting, and provided opportunities for learning. Though we had no sales experience, our first business was traveling from city to city selling jewelry at flea markets. That endeavor was the first of several attempts in the retail business, all of which provided important business lessons but not much income.

Likely the greatest training ground for my current career came through State Accounting, a family business founded by my grandparents. During the 10 years I worked at State Accounting I modernized and computerized processes, expanded the client base through marketing, managed more than 200 business relationships, and personally completed more than 400 tax returns every year.

### **A first entrepreneurial venture**

I left State Accounting to pursue a partnership and created Bingo City Flea Market. Our 50,000-square-foot building housed a 400-seat bingo hall, three restaurants, and 200 vendor spaces. What we needed most—an outdoor selling area—was not available, and so we closed. To some, this experience might seem disastrous. Yet for me, it was life changing.

The closing of Bingo City Flea Market forced me to quickly find a new job, and my new job turned out to be one of the first steps toward establishing my own financial consulting business. Rather than accept an offer to work at Smith Barney



(an offer that came through one of my colleagues who knew of my contributions to State Accounting), I chose instead to work with my brother at Paine Webber. Here was an opportunity to work with someone who knew me and believed in me! So while I worked and pursued the education and licenses necessary to become a financial planner, Debbie helped support our family by becoming a successful realtor.

### **The road to my own business**

Yet my employment at Paine Webber became tenuous because I was away from my desk and out of the office so frequently. Where was I? Rather than waiting for the telephone to ring, I was out meeting clients and building relationships. Though I never labeled it “PEOPLETIZING” at that time, that’s exactly what I was doing.

My experiences at Paine Webber reinforced the lessons from high school tennis: focus and strategy, and also led me to the realization that I wanted to establish my own financial planning and consulting firm. Although some

questioned my abilities, I took the plunge. Coe Financial Group started small—and today is an extraordinarily successful business. We work as a team, advising clients and managing more than \$100 million in assets and grossing more than \$1,000,000 annually. (There's more to this story, so I hope you'll read on!)

### **The challenges continue**

My life story is not meant to generate sympathy. It's just my story—and every life experience has brought me to the place I am at today.

From a place of few connections, I've developed innumerable relationships and associations—by listening and by helping. From a place of struggle and deficit, I've worked hard to learn, experiment, and not be diminished by failures. In my life, struggle created passion.

Success has brought me pleasure, yet I do not rest on my laurels. I continuously remind myself of the importance of every day, and, with an eye to the future, I still seek new challenges and opportunities.

What I know most of all is this: what I am, what I know, and what I do emanated from everything that happened in my life—and is the philosophy I now call “PEOPLETIZING.” While I am proud of my accomplishments, I am still humbled by the place I find myself. I only hope that the time, the affection, and the support that I give others can in some small measure reflect the time, affection, and support that was—and continues to be—provided to me. Because it is in giving that I continue to learn to accept the affection and support of my wife, family, friends, clients, and professional acquaintances.

May my story—and the ideas offered between these covers—inspire you to “PEOPLETIZE.”

*“Helping others succeed has been my mantra since I got out of college and into the workforce. I always figured that if I could help people, I would be helped in return.” Chad Coe*

## Chapter 2

### What is a PEOPLETIZER?

PEOPLETIZING is a lifetime discipline for building a balanced and successful life. What are the characteristics of a PEOPLETIZER? How will you recognize a PEOPLETIZER? (Use of the male pronoun in no way reflects the ability of women as well as men to be PEOPLETIZERS.)

- A PEOPLETIZER has identified his values; he lives by them and continues to question them and improve them.
- A PEOPLETIZER creates his own opportunities because he is brimming with passion for all the activities he engages in.

- A PEOPLETIZER possesses a well-thought-out life philosophy that he can articulate. It is a philosophy that shines through and sustains him regardless of life's daily strains and stresses.
- A PEOPLETIZER has a healthy and successful attitude about life. He knows that money is an adjunct to a great life—never the primary focus.

*“Happiness is not a station you arrive at,  
but a manner of traveling.”*

*Margaret Lee Runbeck (1905-1956)*



### **Joyful and Optimistic**

A PEOPLETIZER loves life and living. A PEOPLETIZER sets his sights high, always does his best—and is humble and grateful. Committed and passionate, a PEOPLETIZER knows that dreams come true with commitment, concentration, and passion. A PEOPLETIZER checks his values daily and lives in accordance with those values. He is never swayed by what is popular at the moment. A PEOPLETIZER projects a positive attitude wherever he is—always cognizant of how much he affects those around him. A PEOPLETIZER knows that life is fragile and every moment of every day counts.

### **Self-sufficient and Focused**

A PEOPLETIZER is independent; he is comfortable with himself and confident in his own abilities and place in life. He sets goals and works hard to achieve them; he is fully aware that it is multiple small steps that lead to success in the large projects. Because he is successful, he can stand on his own two feet . . . as well as graciously walk side-by-side with others.

## **Generous**

A PEOPLETIZER genuinely cares about people and believes in the law of reciprocity. He is involved in the lives of others because he has the emotional health to connect, share, and help. A PEOPLETIZER does not judge a book by its cover; he avoids harming others. He is a mentor. He strengthens the people around him so they can flourish.

A PEOPLETIZER is a team player, capable of surrendering himself to the larger group for the greater good. He always strives to surround himself with good people because it is the way he grows and learns. A PEOPLETIZER'S success comes from connections and relationships.

## **Loyal**

A PEOPLETIZER values his relationships with family, friends, colleagues, and acquaintances. He is attentive to their interests, and supportive when they have concerns or experience problems.



### **Communicative**

A PEOPLETIZER builds trust through effective and empathic exchanges with others. He is a skilled listener and is patient in his communication with others—realizing that what is clear to him may be confusing to others.

### **Flexible**

A PEOPLETIZER accepts and welcomes the constant of change. He does not cling to unrealistic, counter-productive beliefs, but retools in the face of challenges—knowing that change brings opportunities and learning. A PEOPLETIZER is also flexible in his interactions with others: realizing that no one is perfect, he always believes in second chances.

### **Reliable**

A PEOPLETIZER keeps commitments. He is conscious of time, and responsive to the needs and concerns of others.





## **A Model**

A PEOPLETIZER sets an example that others can follow. As a leader, his focus is others, never himself. A

PEOPLETIZER knows what he's good at, and delegates the rest. He always gives 100% to any effort, and expects the same. He surrounds himself with talented people he can learn from, and encourages others to grow and learn. He understands that people will step up and determine when it's time to step down—and he's comfortable with both.

*“The more people I help, the better I become.”*

Chad Coe



**Whether the endeavor is personal or professional, a PEOPLETIZER works from a foundation of philosophy, goals, and plans.**

✓ **Articulate a life philosophy.** To build and sustain a life of quality, it is important to articulate a personal and professional philosophy. More than anything, I remind myself that life is not always fair or good, so if something bad happens, I just let it go. (There is so much we cannot control!) I also remind myself to give life a chance, to let life happen! Everything is a work in progress.

✓ **Create written goals—and a daily “to do” list.** It’s easier to reach a goal—any goal—if you’ve committed to it in writing.

✓ **Always have a five-year plan.** I’m a big believer in giving something 5 years to germinate. That’s my magic number—and that’s why I am never disappointed. I use this strategy in working with clients. It puts us on the same page and helps avoid disappointment. It allows time for things to grow and change.



## Chapter 3

### **Applying PEOPLETIZING in the Business World**

Whether you are starting a business, pursuing a new career or job, or looking for opportunities to contribute to the betterment of your community, you can find success through PEOPLETIZING!

PEOPLETIZING is all about making connections and discovering ways you can help others and they can help you! While the obvious place to make connections is at a networking meeting convened for that purpose, opportunities to network present themselves constantly: a Chamber of Commerce event, an association meeting, a tennis court, the local health club, a holiday party, or a 4th of July celebration.



Formal or informal, networking is simple and powerful. The first networking group I convened was at a local restaurant. Twenty people attended. The meeting gave me an opportunity to introduce myself, share my work experiences, announce the founding of my financial consulting business, and offer information about my services. The meeting also gave participants the opportunity to make business contacts of their own. While some were skeptical about this process for connecting with potential clients, it worked.

The meeting was spectacular! Everyone learned and made important connections. Many of the people who attended that meeting are still a part of my network. For me, the meeting was a profound reminder of two important behaviors: be generous; be genuine.



From that first event I went on to initiate as well as join networking groups, and create a personal board of advisors to help me build my business. Through networking, I discovered my niche: unemployed executives, business owners seeking new opportunities, and people who inherited money.

Today I continue the formal networking process I started with, and I am always alert for ways to make new connections informally. I support, mentor, and coach people in career transition—offering them a genuine listening ear, assisting them as they develop plans that will ensure success, and sharing information about the services of Coe Financial Group. Some people need financial consulting in the midst of their transition; some return to me once they've launched a new business or secured a new job. As I establish relationships with people, I gain their trust. As a result, many become clients; many become my “walking advertisement” who refer me to colleagues and friends.



In addition to my on-going involvement in several networking groups (see Networking Groups), I also speak at outplacement firms and career placement centers, sharing my story and presenting workshops on employment strategies and networking.

Yes, networking works—and it can work for you! With patience and persistence, the Golden Rules of Networking (pages 24 - 28) can help you create the life you are seeking. You can apply the rules wherever you are. In doing so, you'll become a PEOPLETIZER!

## **Networking Groups**

Breakfast of Champions is a business networking organization that provides a forum for successful business owners and executives in transition to exchange information, build business relationships, increase business by exchanging leads, and form strategic alliances.

Executive Growth Forum is an exclusive by-invitation-only networking group for senior executives in transition. It provides a forum for developing business networking relationships and gives members an opportunity to give and receive referrals. Members get together between meetings to learn more about one another.

Affiliated Medical Network, Inc. is a business networking group that focuses on developing relationships with doctors and dentists.



## **The Golden Rules of Networking**

### **Always network.**

Everyone can help you, and you can help others! Give everyone a chance.

### **Never go to an event alone.**

It is much more fun and productive to go with an associate or a friend. You can introduce each other to the people you connect with individually.

### **Have a great “elevator” presentation.**

Because the first 15 seconds of an interaction are so important, make certain that you can simply and dynamically describe what you do.

### **Project a winning attitude.**

If you are positive and enthusiastic, people will want to be around you and help you. If you are gloomy and negative, others will avoid you.





**Give your undivided attention to the person you are talking to.**

Make eye contact, shake hands, repeat the person's name—and listen!

**Be willing to go beyond your comfort zone!**

If you have the urge to introduce yourself to someone, DO IT! You might hesitate, thinking that the person is too important or too busy to speak with you. Even if you are nervous, force yourself to move forward and make contact. You'll get more comfortable introducing yourself to new people as time goes on.

**Ask for introductions and help.**

There's no need to be shy—networking is all about helping others!



**Don't let a conversation end without exchanging business cards.**

Build your network by exchanging business cards and noting something from your conversation to help you remember each contact. Make certain you provide a card that is distinctive and colorful—and contains all pertinent information. Use both sides of the card to include your name, address, telephone numbers, e-mail address, web site, and branding. Every contact is a member of your network!

**Network in the right circles.**

Find groups that are a match for your interests and endeavors. Network with people who are employed as well as those who are in transition.

**Actively participate in groups and organizations.**

Effective networking and relationship building takes more than paying dues, attending meetings, and being listed in a directory. Show your commitment to a group by contributing your time and your talents.



**Call people from time to time without a hidden agenda.**

Ever hear from an old friend who calls just to say hello—and then gets to the real reason for the call? How does that make you feel? To avoid being perceived in this way, take five minutes every day and call one person in your network simply to ask how he or she is doing. Offer your support or encouragement.

**Always give more than you get.**

The power of reciprocity is tremendous—and works if you let it!

**If you're not having fun, you're doing something wrong!**

Networking is energizing: you can add to the success of every event you attend.

**Follow-up**

Call or e-mail the contacts you make to share additional thoughts, ideas, and suggestions.

**Tell people how they have helped you.**

If you sat next to someone at a meeting and received helpful suggestions, let that person know *specifically* how you utilized the advice (or how you plan to implement it). People like to know that you value their opinions and that you benefited from their knowledge.

Follow **The Golden Rules of Networking** and you'll be amazed at what unfolds. Distinguish yourself as a PEOPLETIZER by being genuine in your interactions with others. Make certain you engage in reciprocal exchanges: listen well and speak well. (See “Conversational Questions to Conquer Fears.”) Finally, distinguish yourself with timely follow-up—and by keeping commitments.

**Great networking skills are not a substitute  
for being excellent at what you do.**

Make certain that you are talented and that you are always learning so that your networking efforts will yield the results you are seeking.



## **Conversational Questions to Conquer Fears**

Is it tacky to discuss business at a social event? Is it being “pushy” to talk about work during everyday conversation? To overcome the fear, ask questions! Not sales questions, but questions people who are meeting you for the first time would be happy to answer: questions about themselves and their business, questions that will create an opportunity for follow-up, questions that might turn a stranger into a client or customer—and lead to referrals.

Here are some of these “friendly” questions. The questions are designed to put a person at ease, to be a first step toward helping others know you, like you, and trust you. Most of these questions will elicit a positive response; all will provide an opportunity for new acquaintances to share a story, offer a perspective, and provide you with insight into their thinking!



While there is no need to ask all ten questions (you are not an investigative reporter!), it is good to be familiar with the questions so that you can select those most appropriate for the situation.

1. How did you get your start in your business/your career?
2. What do you enjoy most about your profession?
3. What separates you/your company from your competition?
4. What advice would you give to someone starting out in this field?
5. What one thing would you do if you knew you would not fail?
6. What significant changes have taken place in your profession through the years?



7. What do you see as coming trends in this field?
8. What was the strangest/funniest incident you've experienced in your business?
9. What ways have you found to be the most effective when promoting your business?
10. How would you like people to describe the way you conduct business?

### **My Favorite Question**

Who can I connect you with that will help you in your life or business?



## Chapter 4

### **Applying PEOPLETIZING to Your Personal Life**

PEOPLETIZING has roots in our personal lives also. The beautiful partnership that began when Debbie and I were teenagers blossomed into marriage and a family, and now we have three children (Geoffrey, Jordan, Zachary). Being a father has been one of the most profound experiences of my life. I love spending time with my sons; I love seeing them smile; I love having our home filled with their friends.

I demonstrate involvement and commitment to my children by giving them my attention, building relationships with each of them individually, and being actively involved in their lives. I strive to be a positive role model for my





sons—by expressing my love and affection for them, respecting and loving their mother, ensuring our family’s financial stability, and using mistakes as moments to teach life lessons.

I arrange my schedule so that I am able to attend every sporting and extracurricular event my sons are involved in (as well as every function Debbie is involved with). Participating in my sons’ activities and events is a one-time opportunity. Because my parents were not able to attend all of my events I am confident that my children not only appreciate my presence, but will remember and cherish these moments as they grow older.

My sons are involved in what I do, too. In the same way my father taught me about his work, I bring my sons to my office. It’s important for them to learn about what I do; it’s important for them to understand what it takes to earn a living. Beyond showing them what’s involved in

my business, it is extraordinarily important to me to help my children realize that everyone needs help and everyone has something to offer. So my sons participate in the foundation I established. Their contributions remind them of the importance of giving back and allow them to see how effectively work gets accomplished when many people contribute. (See the Resources section in the back of the book for more information about Special Kids Network.)

Because I grew up having only a couple of close friends, I thought that having legions of friends was important. Yet what I've discovered is that I want several extremely close long-term friends with whom I can grow old and count on through the years—people with whom I can share my inner feelings, who will face difficult times with me, who will grow with me. I like comparing notes with others about family life and about business because I always learn. I enjoy hearing others' perspectives.



Everyday I rejoice in the life I have. I remind myself to embrace and cherish every moment, because life often changes quickly. The keys to the happiness in my personal life stem from the PEOPLETIZING philosophy I embrace in the other areas of my life: be genuine, listen well, and pay attention. Easier said than done, yet worth every bit of persistence and practice.



## Chapter 5

### Applying **PEOPLETIZING in Service to Others**

Helping others create financial security through my business has been very rewarding, yet I wanted more. Debbie and I wanted to make a difference in the lives of children with special needs. We believe that giving back is a necessity, and we wanted influence over how we shared our time and resources.

*“If you want something, create it.”*

*Chad Coe*

When our nephew was diagnosed with special needs, we knew it was time to take a step, and so we founded the Special Kids Network. This charity has been one of the joys of my life—proving once again that “If you want something, create it.”



While our nephew has been a driving force in the establishment of the Special Kids Network, the experiences of my childhood played a role as well. I know that children with special needs require extra time and attention—and I have not forgotten where I came from and all of the people who helped me.

To build the charity, I applied the characteristics of a PEOPLETIZER and many of The Golden Rules of Networking.

▪ **The “Elevator” Presentation**

To engage people in the efforts of Special Kids Network, I developed a single sentence that describes Special Kids Network. I shared it with everyone I came in contact with, and continue to do so today.

▪ **A Winning Attitude**

It is important to be passionate and enthusiastic. I talk about the accomplishments of the Special Kids Network. Even today, few people decline the opportunity to be involved.



▪ **Connections and Introductions**

I asked colleagues and friends for introductions to people who I had identified as potential contributors to the Special Kids Network.

▪ **Exchanging Information**

While I had the good fortune to have many connections when I started the charity, I continue to reach out to people wherever I go. Before I conclude any networking conversation, I always make sure that contact information has been exchanged.

▪ **Appreciation**

I never stop thanking people for every contribution they make to Special Kids Network.

The results of these efforts have been nothing short of amazing. Colleagues, friends, and strangers continue to show me that everyone can help you, and you can help others. Special Kids Network is a great example of PEOPLETIZING at its best!



# Chapter 6

## Leverage the Power of Master Mind

### The Origins of Master Mind Groups

The concept of a “Master Mind” began with the 1928 Napoleon Hill book, *The Law of Success*. His work was originally commissioned by the request of Andrew Carnegie. The idea of capturing the secrets to success followed Mr. Carnegie’s multi-day interview with Hill. This inspired similar interviews with over 100 American millionaires that spanned 20 years. The subjects included famous, self-made industrial giants of the era; Henry Ford, J. P. Morgan, John D. Rockefeller, Alexander Graham Bell, and Thomas Edison.

Prior to the book’s publication, *The Law of Success* content was used in lectures, the author delivered in nearly every city and in many smaller localities, throughout the United States over a period of more than seven years.

In Lesson 1 of *The Law of Success*, Dr. Hill defines the concept of The Master Mind:



*"A mind that is developed through the harmonious cooperation of two or more people who ally themselves for the purpose of accomplishing any given task."*

Hill uses ideas from physics to illustrate the synergy that occurs among like-minded individuals. To simplify the concept today, we say that *two heads are better than one*. The synergy that occurs when great minds are brought together for a common purpose far exceeds solutions that can be created by one person alone.

Dr. Hill warns his readers about the danger to the master mind group of any single member who thinks negatively. Today's professional facilitators know the importance of reining in naysayers. They understand that the effectiveness of *brainstorming* depends on a creative process where each idea generated allows for new ideas to branch off in new directions.

Another key insight from Hill is that

*Knowledge is not power – it is only potential power.*





He defines power as "...organized knowledge, expressed through intelligent efforts." The master mind group makes this happen.

### **PEOPLETIZING With The Power of Master Mind**

In April of 2009, the US economy hit rock bottom. The jobless rate soared. My reputation for *PEOPLETIZING* led to scores of displaced professionals seeking my help. My days were filled with grim meetings with those who had all but lost hope of finding their next opportunity. Many people were highly accomplished executives. Most were once considered great at their chosen profession. But they were not so great at finding new opportunities. And with their confidence shattered, they struggled to sell themselves.

### **Necessity is The Mother of Invention**

As I sought to help the seemingly endless line of talented, disheartened professionals, I decided that, though quite overwhelming, was a challenge I wanted to conquer. Then, I remembered the ideas in *The Law of Success*. I established a Master Mind group for talented executives in



transition that also included individual, independent consultants. The Master Mind group met weekly around a conference table in my office. The members shared their challenges and the group brainstormed for solutions and shared knowledge and insight. After six months, the results were organic, powerful and magical. Our members' confidence level skyrocketed and their approach became more focused and efficient.

### **Successful Outcomes**

The group created a camaraderie based on trust and mutual support. Members shared valuable connections and tactics.

As opportunities surfaced, members were able to convert them to new jobs, partnerships and client relationships. We successfully took Napoleon Hill's idea from the 1920's and made it work in the 2009 downturn. Collectively, all of us really were smarter and more effective than any one of us! When we assemble a brain trust for the purpose of sharing and solving, the results are spectacular!

Our Master Mind members report improvements in:

- Confidence
- Clarity and Focus
- Connections and Meaningful Trusted Friendships

### **Master Mind Replication**

Based on the success of that first Master Mind Group, I formed three more groups. I've learned that weekly participation is key to a group's success. To enable participation, it's best to work with groups that allow for all members to contribute at each meeting. Our groups are normally no larger than 10 to 12 members. When one group filled up, I started another. We've had as many as 60 active participants in five groups in progress at the same time!

Our Master Mind Groups generate a surprising variety of successful outcomes; professional, business and personal.

### **An Unexpected Outcome**

We've found a way to make the world a better place by improving the lives of our members both professionally and

personally. I'm pleased to share that leading these groups has brought personal fulfillment and enriched my life beyond my wildest expectations. My LinkedIn profile is filled with glowing testimonials of positive change and successful, personal outcomes. We've included the most relevant testimonials (including videos) on our website, [MasterMindConnections.com](http://MasterMindConnections.com). For me, it simply does not get any better than this and I have gained far more from this experience than I ever invested in it

### **Who Are the Master Minds in Your Life?**

By combining the power of *PEOPLETIZING* with the Master Mind concept, you have access to a massive amount of untapped, potential power. What if **you** could organize a group of diverse, like-minded individuals and engage them for the purpose of helping one-another to achieve their goals? By creating a master mind, your members accomplish much more than they can do by going it alone.

### **Master Mind Group Leader Guidelines**

- Establish start and end times for your meetings and adhere to them



- Limit the group size to between 6 to 8 participants
- "Establish Confidentiality and a *Safe Harbor*
- Limit membership to like-minded, successful individuals
- Recruit "*givers*". Avoid and dismiss "*takers*".
- Be aware of the group's introverts and extroverts. Encourage the introverts to contribute. Assure that the extroverts do not dominate the discussion.
- Stress Confidentiality and a Safe Harbor. There must be an understanding that confidential information that is shared with the group is not to be shared with outsiders.
- Familiarity builds trust. Trust is a prerequisite for candor.
- Remember: Your role is the *facilitator* of Master Minds. Not the *lead consultant*. The agenda must focus on engaging the members address the member's challenge at hand.
- Encourage members to focus on the individual member's needs and concerns.



- Avoid negativity. There are no **bad ideas** (there are only some we choose not to implement immediately).

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# Chapter 7

## **Applying PEOPLETIZING to Coe Financial**

*“When I manage clients’ money, I change their lives.”*

*Chad Coe*

By adhering to the concepts of PEOPLETIZING, my goal of building a successful business came true! Coe Financial Group creates and preserves financial well-being for businesses and individuals. As president, I support and continuously build the team of consultants (all of whom I met through networking) who serve our clients.

Because we are looking for clients for life, focus and integrity are at the heart of everything we do. A client’s goals and needs come first. The foundation of our interactions with clients is simple, yet again, these PEOPLETIZING activities take patience and perseverance. Four activities were at the foundation of Coe Financial; the same four activities continue to keep the business flourishing.



## **1. Partnering with clients**

We listen carefully to clients' wants and needs, help them clarify or develop goals, and then build an investment portfolio that reflects their individual goals and preferences. Because some clients have not defined their life goals, we help them do that. The financial plan we develop is continuously monitored and assessed, and we are in regular contact with clients. This relationship building has made it possible to create clients for life.

## **2. Business alliances**

Some of my most productive alliances have come from the "PEOPLETIZING" relationships I've nurtured with outplacement firms. I offer free presentations on all aspects of finding a job, and then briefly share information about the services of my firm.





Participants gain strategies and hope for their job search; I often gain opportunities to help people through difficult financial times. These are win/win partnerships; everyone involved benefits!

### **3. Networking groups**

I started participating in networking groups long before I founded Coe Financial. When I was in accounting, networking groups provided an avenue for learning. Inspired by Thomas Stanley's books on selling and marketing, I began participating in more and more groups, and then took what I learned to create and lead new groups. More than a decade later, I never tire of watching PEOPLETIZING unfold; I never tire of hearing about the amazing connections that are created when a group of people get together!

### **4. Business accountability group**

The group is a sounding board for the management, growth, and marketing of my business, and part of the process by which I am accountable for my decisions and plans. Every month we look at where each business has been, where it's going, and how best to ensure growth and stability.



PEOPLETIZING is a path for establishing a business, and for helping it flourish. In addition to the expertise of every member of the Coe Financial Group team, we rely on two simple concepts for interacting with our clients: great communication and superior Customer Service.



## Chapter 8

### **PEOPLETIZING: The Results**

PEOPLETIZING is not a passive sport. While the components appear simple and perhaps even well-known, carrying out the work takes patience and persistence. I am a bottom-line, results-oriented person—and I also know that the success and pleasure I've achieved is the result of all the connections I have made by embracing the concepts that I shared with you in this book.

PEOPLETIZING is about paying attention; it is about being generous; it is about making the world a more people-centered place. Never before have these ideas been so needed. *You can* PEOPLETIZE. *You can* get connected, and *you can* connect others. *You can* help. *You can* get help. Tangible and intangible results will unfold.



People will:

- √ **call** you for advice, share their adventures, and include you in their plans and activities.
- √ **refer** you—for jobs; for business.
- √ **invite** you into their networks.
- √ **talk** about you to others; be your “walking commercial.”
- √ **help** when you ask because you help others.

In addition, you will:

- √ **build** lasting, strong, professional relationships.
- √ **gain** respect in the business community.
- √ **become** recognized as genuine person, known for integrity, honesty, and empathy.
- √ **feel** good because you’ve helped others.
- √ **make** a difference in another person’s life.
- √ **bring** more abundance and satisfaction into your life.

I know about these results. They came true for me because I am a PEOPLETIZER.



## **Special Kids Network**

### **Mission**

The mission of Special Kids Network is to create community awareness and raise funds in support of organizations who believe that every child and young adult – regardless of the nature of their background or disability – should be able to enjoy life to its fullest and to participate in the mainstream of their community.

### **Beneficiaries**

#### **Keshet**

Keshet provides educational, recreational, and vocational programs for children with special needs. Keshet's impact beyond the schools and summer programs includes its national prominence as a premier training center serving thousands of teachers, students, and parents in the treatment of autism through structured learning techniques.



For many years, Special Kids Network has supported Keshet's Teen Camp which gives campers ages 11 - 21 the opportunity to participate in overnight programs that highlight vocational training with an emphasis on increasing levels of autonomy for these young adults.

## **The Gastro-Intestinal Research**

### **Foundation of Chicago**

GIRF is a group of people from all walks of life; many are patients, all are friends, united in a common effort to support research on the causes and cures of digestive diseases. Donations from Special Kids Network will help support the building of a center of excellence for gastrointestinal cancer research, create a Midwest patient registry, support the current clinical investigators, recruit and support basic researchers, and provide seed money where no other funds were available to underwrite unproven but promising research for pediatrics.



## **The National Stuttering Association**

NSA is the largest self-help organization in the United States for people who stutter. Its mission is to bring “hope, dignity, support, education, and empowerment to children and adults who stutter and their families.” With donations from Special Kids Network, NSA was able to fund its Family Programs and help families get to the national conference and add staff to handle the administration of family programs.

## **The Foundation for Retinal Research**

The Foundation for Retinal Research was founded in 1998 by Betsy and David Brint, whose son Alan was born with Leber’s Congenital Amaurosis, a genetic disease severely affecting the retina. The Foundation is paving the path toward a sighted future for visually impaired people of all ages. With donations from Special Kids Network, the Foundation helps families who cannot afford genetic screening (thus identifying future candidates for treatment). Donations also support the 4-day national



conference where children are seen by leading doctors, parents meet researchers and gather information, and families share information that help them learn about raising a child who is blind. The conference is life changing for many families.





The Special Kids Network also extends to:

- Alzheimer's Association (In Honor of Joe Girardi)
- Autism Speaks
- Best Buddies in Arizona (In Honor of Jeremy Roenick)
- CharitaBulls
- Chicago Blackhawks Charities
- Children and Adults with Attention-Deficit/  
Hyperactivity Disorder
- Cure Autism Now
- Equestrian Connection
- Helping From Heaven
- Lean on Me, Kids Helping Kids
- Midwest Center on Law and the Deaf
- Rainbows
- Special Gifts Theater
- Stefani Children's Foundation
- Suburban Fine Arts Center
- The Lawrence Hall Youth Services

Interested in getting involved?

Contact us . . .

[www.specialkidsnetwork.org](http://www.specialkidsnetwork.org)

847.444.9444



## **Chad Coe, Speaker**

Chad Coe's passionate, vibrant presentation about PEOPLETIZING—a phrase he coined—describes the leadership ideas he developed based on his life experiences and his interactions with people from all walks of life. Chad's message resonates with audiences everywhere, inspiring people to create the life of their dreams by:

- changing their beliefs and their futures,
- setting achievable goals,
- incorporating personal values into all their endeavors,
- becoming more productive,
- developing their own PEOPLETIZING skills,
- helping others become PEOPLETIZERS, and
- achieving abundance and satisfaction.

Invite Chad Coe to speak at your next meeting, seminar, workshop, trade show, or convention. You will not be disappointed!

Chad Coe  
847.444.9444



## **Coe Financial Group**

**Get an independent perspective for your future.**

Coe Financial Group is an independently owned wealth management firm delivering personalized service to clients for more than a decade. Clients' peace of mind is our main concern, and independence allows us to offer objective recommendations that will best serve clients' unique investment needs.

Because Coe Financial Group has no obligation to sell proprietary products or services, we recommend only those investment products and services that we believe are best suited to help you realize your financial objectives. We extend the highest level of integrity and customer service as we assist you with retirement planning, financial planning, insurance strategies, asset management, and estate planning.

### **Coe Financial Group**

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**WHAT IS PEOPLETIZING<sup>SM</sup>?** *Linking people through thoughtfulness, caring, sharing, and mentoring; a genuine, strategic, compassionate way of connecting people that works to everyone's advantage; building relationships in order to purposefully help one another; acknowledging and learning about people informally in order to avoid the "dance" of cold selling.*

# THE POWER OF PEOPLETIZING<sup>SM</sup>

## NETWORKING YOUR WAY TO AN ABUNDANT LIFE

As you seek to achieve bigger and better things in life, you have two simple choices. You can try a **do-it-yourself** approach or, you can engage others to help and support your efforts. As the title suggests, **The Power of Peopletizing<sup>SM</sup>** is a guide to proven practices for getting results though involving others. You will learn how **Peopletizing<sup>SM</sup>** lessons apply to:

- PERSONAL INITIATIVES
- BUSINESS GOALS
- NOT-FOR-PROFIT/CHARITY SUCCESS

*"The essence of Chad Coe is his positive energy, integrity and sincere interest to unify people and improve their lives."*

*– Rob Miller,  
Job Plex*

*"Chad is also a man of boundless benevolence who demonstrates a true sense of charity and pay-it-forward."*

*– J.D. Gershbein,  
Owlsh Communications*



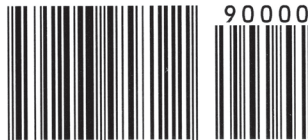
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Chad Coe's ability to **Peopletize<sup>SM</sup>** has fueled his success as an entrepreneur, philanthropist and father.

In this quick-reading and inspiring book, Chad shares his stories and lessons that you can immediately apply towards leading a richer, more fulfilling life.

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