OVERVIEW

Quarterly Niche Decision

Diagnose the situation, choose a target and capture the first insight.

CLIENT / ROLE	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to review focus against evidence, capacity and ethical fit. Leave with a quarterly niche decision memo that can be tested in real, respectful, consent-based work.

WHY THIS MATTERS

Start with client interviews, manager challenges and permissioned programme feedback. Watch for repositioning after one lost proposal. Review niche-qualified pipeline trend as a learning signal, not a promised result.

SELF-ASSESSMENT / SCORE EACH DIMENSION 1 TO 10

LOOK FOR	NOW /10	GOAL /10
01 Audience fit		
02 Problem clarity		
03 Coaching fit		
04 Proof quality		
05 Differentiation		
06 Message recall		

QUICK REFLECTION

Which dimension is the best starting point for this focus: review focus against evidence, capacity and ethical fit?

DEEP WORK I

Quarterly Niche Decision

Use actual evidence. Separate what happened from what you assume it means.

01 / CURRENT PICTURE

01 Review client interviews, manager challenges and permissioned programme feedback. What observed moment shows the need to review focus against evidence, capacity and ethical fit?

02 What did the client, colleague or manager actually say or do? Record one concrete example.

02 / THE LEVER

03 When you try to review focus against evidence, capacity and ethical fit, which step breaks down first, and in what context?

04 What assumption are you making that the evidence does not yet support? How could you check it?

03 / PRACTICE & TEST

05 Coach question: What evidence would justify changing your market focus?

06 How could you replace repositioning after one lost proposal with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Quarterly Niche Decision

Build a usable artifact, then pressure-test it with a real-world scenario.

07 What must a quarterly niche decision memo contain to help the user review focus against evidence, capacity and ethical fit? Name the first two decisions it supports.

08 Where might repositioning after one lost proposal show up? How will you notice it and adjust before the client or a colleague is affected?

DECISION GRID

Complete five rows while building a quarterly niche decision memo. Use only approved, non-sensitive examples.

CHOICE	WORK / TEAM IMPACT	EVIDENCE	DECISION
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What evidence would justify changing your market focus? Check: niche-qualified pipeline trend.

ACTION PLAN

Quarterly Niche Decision

Move from insight to observable practice, with a realistic measure and review date.

FROM INSIGHT TO ACTION

STEP	PRACTICE ACTION	BY WHEN
01 REVIEW	Inspect one real example from client interviews, manager challenges and permissioned programme feedback.	
02 BUILD	Draft a quarterly niche decision memo using that evidence.	
03 REHEARSE	Practise the move with a coach or peer and request one correction.	
04 TEST	Try it in one relevant, a real, consented work interaction.	
05 ADAPT	Review niche-qualified pipeline trend and change one thing.	

SUCCESS METRIC

Leading signal: niche-qualified pipeline trend. Choose a baseline and a realistic target; outcomes are not guaranteed.

MILESTONES / WHEN WILL YOU LOOK FOR EVIDENCE?

CHECKPOINT	WHAT YOU EXPECT TO SEE	REVIEW DATE
DAY 30		
DAY 60		
DAY 90		

SUPPORT NEEDED

MAIN RISK

COMMITMENT & FIELD NOTES

Quarterly Niche Decision

Agree the next move, track what happened and return with evidence.

MY COMMITMENT

In the next relevant situation, I will use a quarterly niche decision memo to review focus against evidence, capacity and ethical fit.

IF THIS GETS IN THE WAY, I WILL...

PARTICIPANT SIGNATURE

DATE

WEEKLY FIELD NOTES

WEEK	SITUATION	WHAT I TRIED	EVIDENCE + ADJUSTMENT
01			
02			
03			
04			

IN THE CLIENT OR MANAGER'S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

Keep client and employer data private. No results are guaranteed.