

PRACTICE GROWTH

VOLUME 01

Performance Coach Positioning & Niche

20 ORIGINAL PERFORMANCE-COACHING TOOLS

100 worksheet pages / US Letter / 5 pages per tool

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OVERVIEW

Ideal Client Profile

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to identify professionals with a coachable performance gap. Leave with a one-page ideal client profile 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 defining every underperformer as a fit. Review qualified discovery conversations 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: identify professionals with a coachable performance gap?

DEEP WORK I

Ideal Client Profile

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 identify professionals with a coachable performance gap?

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

02 / THE LEVER

03 When you try to identify professionals with a coachable performance gap, 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: Which client would need support outside your competence?

06 How could you replace defining every underperformer as a fit with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Ideal Client Profile

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

07 What must a one-page ideal client profile contain to help the user identify professionals with a coachable performance gap? Name the first two decisions it supports.

08 Where might defining every underperformer as a fit show up? How will you notice it and adjust before the client or a colleague is affected?

EVIDENCE AUDIT

Complete five rows while building a one-page ideal client profile. Use only approved, non-sensitive examples.

SOURCE	WHAT HAPPENED	WHAT IT SUGGESTS	NEXT CHECK
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which client would need support outside your competence? Check: qualified discovery conversations.

ACTION PLAN

Ideal Client Profile

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 one-page ideal client profile 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 qualified discovery conversations and change one thing. 	

SUCCESS METRIC

Leading signal: qualified discovery conversations. 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

Ideal Client Profile

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

MY COMMITMENT

In the next relevant situation, I will use a one-page ideal client profile to identify professionals with a coachable performance gap.

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.

OVERVIEW

Buyer Role Map

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

CLIENT / ROLE	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to separate individual client, manager and employer priorities. Leave with a three-role priority map 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 writing one promise for incompatible expectations. Review goals agreed across roles 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: separate individual client, manager and employer priorities?

DEEP WORK I

Buyer Role Map

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 separate individual client, manager and employer priorities?

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

02 / THE LEVER

03 When you try to separate individual client, manager and employer priorities, 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: Who pays for the coaching and who evaluates the result?

06 How could you replace writing one promise for incompatible expectations with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Buyer Role Map

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

07 What must a three-role priority map contain to help the user separate individual client, manager and employer priorities? Name the first two decisions it supports.

08 Where might writing one promise for incompatible expectations 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 three-role priority map. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Who pays for the coaching and who evaluates the result? Check: goals agreed across roles.

ACTION PLAN

Buyer Role Map

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 three-role priority map 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 goals agreed across roles and change one thing. 	

SUCCESS METRIC

Leading signal: goals agreed across roles. 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

Buyer Role Map

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

MY COMMITMENT

In the next relevant situation, I will use a three-role priority map to separate individual client, manager and employer priorities.

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.

OVERVIEW

Performance Problem Inventory

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to rank observable work performance problems coaching can improve. Leave with a performance problem inventory 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 labelling a system or role design issue as personal failure. Review problems validated in discovery 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: rank observable work performance problems coaching can improve?

DEEP WORK I

Performance Problem Inventory

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 rank observable work performance problems coaching can improve?

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

02 / THE LEVER

03 When you try to rank observable work performance problems coaching can improve, 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 behavior would change if this gap were coachable?

06 How could you replace labelling a system or role design issue as personal failure with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Performance Problem Inventory

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

07 What must a performance problem inventory contain to help the user rank observable work performance problems coaching can improve? Name the first two decisions it supports.

08 Where might labelling a system or role design issue as personal failure show up? How will you notice it and adjust before the client or a colleague is affected?

EXPERIMENT LOG

Complete five rows while building a performance problem inventory. Use only approved, non-sensitive examples.

MOVE TO TEST	CONTEXT	SUCCESS SIGNAL	LEARNING
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What behavior would change if this gap were coachable? Check: problems validated in discovery.

ACTION PLAN

Performance Problem Inventory

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 performance problem inventory 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 problems validated in discovery and change one thing. 	

SUCCESS METRIC

Leading signal: problems validated in discovery. 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

Performance Problem Inventory

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

MY COMMITMENT

In the next relevant situation, I will use a performance problem inventory to rank observable work performance problems coaching can improve.

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.

OVERVIEW

Niche Interview Plan

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to learn from real performance coaching purchases without leading questions. Leave with a ten-interview research guide 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 asking whether people like the proposed package. Review completed unbiased interviews 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: learn from real performance coaching purchases without leading questions?

DEEP WORK I

Niche Interview Plan

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 learn from real performance coaching purchases without leading questions?

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

02 / THE LEVER

03 When you try to learn from real performance coaching purchases without leading questions, 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 triggered the search for performance help now?

06 How could you replace asking whether people like the proposed package with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Niche Interview Plan

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

07 What must a ten-interview research guide contain to help the user learn from real performance coaching purchases without leading questions? Name the first two decisions it supports.

08 Where might asking whether people like the proposed package show up? How will you notice it and adjust before the client or a colleague is affected?

SCRIPT LAB

Complete five rows while building a ten-interview research guide. Use only approved, non-sensitive examples.

MOMENT	WORDS TO TRY	PERSON RESPONSE	REVISION
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What triggered the search for performance help now? Check: completed unbiased interviews.

ACTION PLAN

Niche Interview Plan

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 ten-interview research guide 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 completed unbiased interviews and change one thing. 	

SUCCESS METRIC

Leading signal: completed unbiased interviews. 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

Niche Interview Plan

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

MY COMMITMENT

In the next relevant situation, I will use a ten-interview research guide to learn from real performance coaching purchases without leading questions.

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.

OVERVIEW

Sector Fit Matrix

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to compare sectors by access, urgency, ethics and your capability. Leave with a weighted sector-fit matrix 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 choosing a sector only for its budget. Review qualified enquiries by sector 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: compare sectors by access, urgency, ethics and your capability?

DEEP WORK I

Sector Fit Matrix

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 compare sectors by access, urgency, ethics and your capability?

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

02 / THE LEVER

03 When you try to compare sectors by access, urgency, ethics and your capability, 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: Where do you have permitted evidence of performance value?

06 How could you replace choosing a sector only for its budget with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Sector Fit Matrix

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

07 What must a weighted sector-fit matrix contain to help the user compare sectors by access, urgency, ethics and your capability? Name the first two decisions it supports.

08 Where might choosing a sector only for its budget show up? How will you notice it and adjust before the client or a colleague is affected?

CONVERSATION MAP

Complete five rows while building a weighted sector-fit matrix. Use only approved, non-sensitive examples.

STAGE	THEIR QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Where do you have permitted evidence of performance value? Check: qualified enquiries by sector.

ACTION PLAN

Sector Fit Matrix

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 weighted sector-fit matrix 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 qualified enquiries by sector and change one thing. 	

SUCCESS METRIC

Leading signal: qualified enquiries by sector. 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

Sector Fit Matrix

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

MY COMMITMENT

In the next relevant situation, I will use a weighted sector-fit matrix to compare sectors by access, urgency, ethics and your capability.

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.

OVERVIEW

Positioning One Liner

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to state who you help, how you practise and what changes at work. Leave with a testable positioning statement 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 promising a promotion or guaranteed appraisal score. Review accurate five-person readbacks 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: state who you help, how you practise and what changes at work?

DEEP WORK I

Positioning One Liner

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 state who you help, how you practise and what changes at work?

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

02 / THE LEVER

03 When you try to state who you help, how you practise and what changes at work, 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: Could a client explain what your coaching actually does?

06 How could you replace promising a promotion or guaranteed appraisal score with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Positioning One Liner

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

07 What must a testable positioning statement contain to help the user state who you help, how you practise and what changes at work? Name the first two decisions it supports.

08 Where might promising a promotion or guaranteed appraisal score show up? How will you notice it and adjust before the client or a colleague is affected?

REALITY SCORECARD

Complete five rows while building a testable positioning statement. Use only approved, non-sensitive examples.

CRITERION	EVIDENCE	NOW /10	TARGET /10
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Could a client explain what your coaching actually does? Check: accurate five-person readbacks.

ACTION PLAN

Positioning One Liner

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 testable positioning statement 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 accurate five-person readbacks and change one thing. 	

SUCCESS METRIC Leading signal: accurate five-person readbacks. 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
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COMMITMENT & FIELD NOTES

Positioning One Liner

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

MY COMMITMENT

In the next relevant situation, I will use a testable positioning statement to state who you help, how you practise and what changes at work.

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.

OVERVIEW

Practice Method Map

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to name the stages of a repeatable performance improvement method. Leave with a four-stage method map 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 branding an acronym without a usable process. Review stage completion and field practice 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: name the stages of a repeatable performance improvement method?

DEEP WORK I

Practice Method Map

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 name the stages of a repeatable performance improvement method?

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

02 / THE LEVER

03 When you try to name the stages of a repeatable performance improvement method, 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 does the client practise at each stage?

06 How could you replace branding an acronym without a usable process with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Practice Method Map

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

07 What must a four-stage method map contain to help the user name the stages of a repeatable performance improvement method? Name the first two decisions it supports.

08 Where might branding an acronym without a usable process show up? How will you notice it and adjust before the client or a colleague is affected?

EVIDENCE AUDIT

Complete five rows while building a four-stage method map. Use only approved, non-sensitive examples.

SOURCE	WHAT HAPPENED	WHAT IT SUGGESTS	NEXT CHECK
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What does the client practise at each stage? Check: stage completion and field practice.

ACTION PLAN

Practice Method Map

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 four-stage method map 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 stage completion and field practice and change one thing. 	

SUCCESS METRIC

Leading signal: stage completion and field practice. 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

Practice Method Map

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

MY COMMITMENT

In the next relevant situation, I will use a four-stage method map to name the stages of a repeatable performance improvement method.

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.

OVERVIEW

Permissioned Proof Bank

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to collect examples of observed performance change with consent. Leave with a permissioned proof-point library 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 sharing identifiable appraisal details. Review approved behavior examples 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: collect examples of observed performance change with consent?

DEEP WORK I

Permissioned Proof Bank

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 collect examples of observed performance change with consent?

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

02 / THE LEVER

03 When you try to collect examples of observed performance change with consent, 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 example can you show without exposing a client?

06 How could you replace sharing identifiable appraisal details with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Permissioned Proof Bank

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

07 What must a permissioned proof-point library contain to help the user collect examples of observed performance change with consent? Name the first two decisions it supports.

08 Where might sharing identifiable appraisal details 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 permissioned proof-point library. 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 example can you show without exposing a client? Check: approved behavior examples.

ACTION PLAN

Permissioned Proof Bank

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 permissioned proof-point library 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 approved behavior examples and change one thing. 	

SUCCESS METRIC

Leading signal: approved behavior examples. 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

Permissioned Proof Bank

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

MY COMMITMENT

In the next relevant situation, I will use a permissioned proof-point library to collect examples of observed performance change with consent.

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.

OVERVIEW

Outcome Claim Audit

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to separate client behavior change from employer decisions you cannot control. Leave with a claims-and-evidence checklist 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 guaranteeing ratings, promotions or bonus outcomes. Review claims linked to dated evidence 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: separate client behavior change from employer decisions you cannot control?

DEEP WORK I

Outcome Claim Audit

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 separate client behavior change from employer decisions you cannot control?

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

02 / THE LEVER

03 When you try to separate client behavior change from employer decisions you cannot control, 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 result can you observe without inventing causality?

06 How could you replace guaranteeing ratings, promotions or bonus outcomes with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Outcome Claim Audit

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

07 What must a claims-and-evidence checklist contain to help the user separate client behavior change from employer decisions you cannot control? Name the first two decisions it supports.

08 Where might guaranteeing ratings, promotions or bonus outcomes show up? How will you notice it and adjust before the client or a colleague is affected?

EXPERIMENT LOG

Complete five rows while building a claims-and-evidence checklist. Use only approved, non-sensitive examples.

MOVE TO TEST	CONTEXT	SUCCESS SIGNAL	LEARNING
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What result can you observe without inventing causality? Check: claims linked to dated evidence.

ACTION PLAN

Outcome Claim Audit

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 claims-and-evidence checklist 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 claims linked to dated evidence and change one thing. 	

SUCCESS METRIC

Leading signal: claims linked to dated evidence. 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

Outcome Claim Audit

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

MY COMMITMENT

In the next relevant situation, I will use a claims-and-evidence checklist to separate client behavior change from employer decisions you cannot control.

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.

OVERVIEW

Training Alternative Map

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to explain when coaching, training or therapy is the right support. Leave with an intervention comparison card 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 claiming coaching fixes every skill or health issue. Review appropriate referrals and proposals 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: explain when coaching, training or therapy is the right support?

DEEP WORK I

Training Alternative Map

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 explain when coaching, training or therapy is the right support?

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

02 / THE LEVER

03 When you try to explain when coaching, training or therapy is the right support, 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: Which part needs a course or clinician rather than coaching?

06 How could you replace claiming coaching fixes every skill or health issue with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Training Alternative Map

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

07 What must an intervention comparison card contain to help the user explain when coaching, training or therapy is the right support? Name the first two decisions it supports.

08 Where might claiming coaching fixes every skill or health issue show up? How will you notice it and adjust before the client or a colleague is affected?

SCRIPT LAB

Complete five rows while building an intervention comparison card. Use only approved, non-sensitive examples.

MOMENT	WORDS TO TRY	PERSON RESPONSE	REVISION
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which part needs a course or clinician rather than coaching? Check: appropriate referrals and proposals.

ACTION PLAN

Training Alternative Map

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 an intervention comparison card 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 appropriate referrals and proposals and change one thing. 	

SUCCESS METRIC

Leading signal: appropriate referrals and proposals. 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

Training Alternative Map

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

MY COMMITMENT

In the next relevant situation, I will use an intervention comparison card to explain when coaching, training or therapy is the right support.

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.

OVERVIEW

Performance Trigger Events

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to recognise work events that make performance coaching timely. Leave with a trigger-event watchlist 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 manufacturing urgency around a review cycle. Review timely relevant enquiries 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: recognise work events that make performance coaching timely?

DEEP WORK I

Performance Trigger Events

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 recognise work events that make performance coaching timely?

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

02 / THE LEVER

03 When you try to recognise work events that make performance coaching timely, 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: Which event makes this performance gap visible now?

06 How could you replace manufacturing urgency around a review cycle with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Performance Trigger Events

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

07 What must a trigger-event watchlist contain to help the user recognise work events that make performance coaching timely? Name the first two decisions it supports.

08 Where might manufacturing urgency around a review cycle show up? How will you notice it and adjust before the client or a colleague is affected?

CONVERSATION MAP

Complete five rows while building a trigger-event watchlist. Use only approved, non-sensitive examples.

STAGE	THEIR QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which event makes this performance gap visible now? Check: timely relevant enquiries.

ACTION PLAN

Performance Trigger Events

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 trigger-event watchlist 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 timely relevant enquiries and change one thing. 	

SUCCESS METRIC

Leading signal: timely relevant enquiries. 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

Performance Trigger Events

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

MY COMMITMENT

In the next relevant situation, I will use a trigger-event watchlist to recognise work events that make performance coaching timely.

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.

OVERVIEW

Client Language Bank

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to capture the words clients use for targets, quality and pressure. Leave with a client-language notebook 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 substituting coaching jargon for their words. Review buyer language reused accurately 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: capture the words clients use for targets, quality and pressure?

DEEP WORK I

Client Language Bank

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 capture the words clients use for targets, quality and pressure?

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

02 / THE LEVER

03 When you try to capture the words clients use for targets, quality and pressure, 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 did the client actually call this problem?

06 How could you replace substituting coaching jargon for their words with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Client Language Bank

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

07 What must a client-language notebook contain to help the user capture the words clients use for targets, quality and pressure? Name the first two decisions it supports.

08 Where might substituting coaching jargon for their words show up? How will you notice it and adjust before the client or a colleague is affected?

REALITY SCORECARD

Complete five rows while building a client-language notebook. Use only approved, non-sensitive examples.

CRITERION	EVIDENCE	NOW /10	TARGET /10
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What did the client actually call this problem? Check: buyer language reused accurately.

ACTION PLAN

Client Language Bank

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 client-language notebook 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 buyer language reused accurately and change one thing. 	

SUCCESS METRIC Leading signal: buyer language reused accurately. 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

Client Language Bank

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

MY COMMITMENT

In the next relevant situation, I will use a client-language notebook to capture the words clients use for targets, quality and pressure.

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.

OVERVIEW

Differentiation Test

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to verify whether your distinctive method matters to a real client. Leave with a differentiation test card 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 mistaking personality for proof of fit. Review client-rated relevance 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: verify whether your distinctive method matters to a real client?

DEEP WORK I

Differentiation Test

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 verify whether your distinctive method matters to a real client?

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

02 / THE LEVER

03 When you try to verify whether your distinctive method matters to a real client, 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 would they miss with a different coach?

06 How could you replace mistaking personality for proof of fit with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Differentiation Test

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

07 What must a differentiation test card contain to help the user verify whether your distinctive method matters to a real client? Name the first two decisions it supports.

08 Where might mistaking personality for proof of fit show up? How will you notice it and adjust before the client or a colleague is affected?

EVIDENCE AUDIT

Complete five rows while building a differentiation test card. Use only approved, non-sensitive examples.

SOURCE	WHAT HAPPENED	WHAT IT SUGGESTS	NEXT CHECK
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What would they miss with a different coach? Check: client-rated relevance.

ACTION PLAN

Differentiation Test

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 differentiation test card 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 client-rated relevance and change one thing. 	

SUCCESS METRIC Leading signal: client-rated relevance. 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

Differentiation Test

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

MY COMMITMENT

In the next relevant situation, I will use a differentiation test card to verify whether your distinctive method matters to a real client.

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.

OVERVIEW

Coach Bio Evidence

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to connect your experience to a specific performance need honestly. Leave with a credible coach biography 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 inflating corporate or credential claims. Review bio-to-discovery meeting rate 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: connect your experience to a specific performance need honestly?

DEEP WORK I

Coach Bio Evidence

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 connect your experience to a specific performance need honestly?

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

02 / THE LEVER

03 When you try to connect your experience to a specific performance need honestly, 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: Which claim can a client verify independently?

06 How could you replace inflating corporate or credential claims with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Coach Bio Evidence

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

07 What must a credible coach biography contain to help the user connect your experience to a specific performance need honestly? Name the first two decisions it supports.

08 Where might inflating corporate or credential claims 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 credible coach biography. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which claim can a client verify independently? Check: bio-to-discovery meeting rate.

ACTION PLAN

Coach Bio Evidence

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 credible coach biography 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 bio-to-discovery meeting rate and change one thing. 	

SUCCESS METRIC

Leading signal: bio-to-discovery meeting rate. 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

Coach Bio Evidence

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

MY COMMITMENT

In the next relevant situation, I will use a credible coach biography to connect your experience to a specific performance need honestly.

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.

OVERVIEW

Offer Storyline

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

CLIENT / ROLE	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to describe the client's before, practice and after without guarantees. Leave with a three-scene programme story 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 telling a rescue story where the client is passive. Review programme understanding in discovery 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: describe the client's before, practice and after without guarantees?

DEEP WORK I

Offer Storyline

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 describe the client's before, practice and after without guarantees?

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

02 / THE LEVER

03 When you try to describe the client's before, practice and after without guarantees, 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 will the client do differently in a real workweek?

06 How could you replace telling a rescue story where the client is passive with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Offer Storyline

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

07 What must a three-scene programme story contain to help the user describe the client's before, practice and after without guarantees? Name the first two decisions it supports.

08 Where might telling a rescue story where the client is passive show up? How will you notice it and adjust before the client or a colleague is affected?

EXPERIMENT LOG

Complete five rows while building a three-scene programme story. Use only approved, non-sensitive examples.

MOVE TO TEST	CONTEXT	SUCCESS SIGNAL	LEARNING
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What will the client do differently in a real workweek? Check: programme understanding in discovery.

ACTION PLAN

Offer Storyline

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 three-scene programme story 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 programme understanding in discovery and change one thing. 	

SUCCESS METRIC

Leading signal: programme understanding in discovery. 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

Offer Storyline

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

MY COMMITMENT

In the next relevant situation, I will use a three-scene programme story to describe the client's before, practice and after without guarantees.

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.

OVERVIEW

Programme Disqualifiers

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

CLIENT / ROLE	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to identify conditions that require another professional first. Leave with a fit-and-referral checklist 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 accepting clinical or disciplinary work as coaching. Review poor-fit enquiries declined early 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: identify conditions that require another professional first?

DEEP WORK I

Programme Disqualifiers

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 identify conditions that require another professional first?

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

02 / THE LEVER

03 When you try to identify conditions that require another professional first, 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: When should a specialist take the lead instead?

06 How could you replace accepting clinical or disciplinary work as coaching with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Programme Disqualifiers

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

07 What must a fit-and-referral checklist contain to help the user identify conditions that require another professional first? Name the first two decisions it supports.

08 Where might accepting clinical or disciplinary work as coaching show up? How will you notice it and adjust before the client or a colleague is affected?

SCRIPT LAB

Complete five rows while building a fit-and-referral checklist. Use only approved, non-sensitive examples.

MOMENT	WORDS TO TRY	PERSON RESPONSE	REVISION
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: When should a specialist take the lead instead? Check: poor-fit enquiries declined early.

ACTION PLAN

Programme Disqualifiers

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 fit-and-referral checklist 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 poor-fit enquiries declined early and change one thing. 	

SUCCESS METRIC

Leading signal: poor-fit enquiries declined early. 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

Programme Disqualifiers

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

MY COMMITMENT

In the next relevant situation, I will use a fit-and-referral checklist to identify conditions that require another professional first.

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.

OVERVIEW

Global Context Check

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to adapt performance examples across US, UK and Gulf work cultures. Leave with a cross-region wording check 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 assuming one appraisal culture is universal. Review regional understanding confirmed 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: adapt performance examples across US, UK and Gulf work cultures?

DEEP WORK I

Global Context Check

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 adapt performance examples across US, UK and Gulf work cultures?

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

02 / THE LEVER

03 When you try to adapt performance examples across US, UK and Gulf work cultures, 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: Which term or assumption needs local validation?

06 How could you replace assuming one appraisal culture is universal with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Global Context Check

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

07 What must a cross-region wording check contain to help the user adapt performance examples across US, UK and Gulf work cultures? Name the first two decisions it supports.

08 Where might assuming one appraisal culture is universal show up? How will you notice it and adjust before the client or a colleague is affected?

CONVERSATION MAP

Complete five rows while building a cross-region wording check. Use only approved, non-sensitive examples.

STAGE	THEIR QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which term or assumption needs local validation? Check: regional understanding confirmed.

ACTION PLAN

Global Context Check

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 cross-region wording check 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 regional understanding confirmed and change one thing. 	

SUCCESS METRIC

Leading signal: regional understanding confirmed. 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

Global Context Check

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

MY COMMITMENT

In the next relevant situation, I will use a cross-region wording check to adapt performance examples across US, UK and Gulf work cultures.

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.

OVERVIEW

Client Case Consent

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to request permission for exactly what a client story reveals. Leave with a case-consent form outline 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 assuming anonymous means unidentifiable. Review approved safe stories 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: request permission for exactly what a client story reveals?

DEEP WORK I

Client Case Consent

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 request permission for exactly what a client story reveals?

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

02 / THE LEVER

03 When you try to request permission for exactly what a client story reveals, 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: Could the team recognise itself from the details?

06 How could you replace assuming anonymous means unidentifiable with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Client Case Consent

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

07 What must a case-consent form outline contain to help the user request permission for exactly what a client story reveals? Name the first two decisions it supports.

08 Where might assuming anonymous means unidentifiable show up? How will you notice it and adjust before the client or a colleague is affected?

REALITY SCORECARD

Complete five rows while building a case-consent form outline. Use only approved, non-sensitive examples.

CRITERION	EVIDENCE	NOW /10	TARGET /10
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Could the team recognise itself from the details? Check: approved safe stories.

ACTION PLAN

Client Case Consent

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 case-consent form outline 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 approved safe stories and change one thing. 	

SUCCESS METRIC

Leading signal: approved safe stories. 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

Client Case Consent

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

MY COMMITMENT

In the next relevant situation, I will use a case-consent form outline to request permission for exactly what a client story reveals.

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.

OVERVIEW

Positioning Readback Test

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

CLIENT / ROLE

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to check how five potential clients interpret your message. Leave with a five-client readback log 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 explaining the message during the test. Review accurate unprompted summaries 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: check how five potential clients interpret your message?

DEEP WORK I

Positioning Readback Test

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 check how five potential clients interpret your message?

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

02 / THE LEVER

03 When you try to check how five potential clients interpret your message, 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 did they believe you would deliver before you clarified?

06 How could you replace explaining the message during the test with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Positioning Readback Test

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

07 What must a five-client readback log contain to help the user check how five potential clients interpret your message? Name the first two decisions it supports.

08 Where might explaining the message during the test show up? How will you notice it and adjust before the client or a colleague is affected?

EVIDENCE AUDIT

Complete five rows while building a five-client readback log. Use only approved, non-sensitive examples.

SOURCE	WHAT HAPPENED	WHAT IT SUGGESTS	NEXT CHECK
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What did they believe you would deliver before you clarified? Check: accurate unprompted summaries.

ACTION PLAN

Positioning Readback Test

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 five-client readback log 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 accurate unprompted summaries and change one thing. 	

SUCCESS METRIC

Leading signal: accurate unprompted summaries. 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

Positioning Readback Test

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

MY COMMITMENT

In the next relevant situation, I will use a five-client readback log to check how five potential clients interpret your message.

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.

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.