

OVERVIEW

Offer Story

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to tell a concise before-method-after story of a client journey. Leave with a three-part offer story that can be tested in real, buyer-respectful work.

WHY THIS MATTERS

Start with client interviews, sales performance data and coach discovery notes. Watch for describing activities without their purpose. Review story recall in buyer calls as a learning signal, not a promised result.

SELF-ASSESSMENT / SCORE EACH DIMENSION 1 TO 10

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

QUICK REFLECTION

Which dimension is the best starting point for this focus: tell a concise before-method-after story of a client journey?

DEEP WORK I

Offer Story

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

01 / CURRENT PICTURE

01 Review client interviews, sales performance data and coach discovery notes. What observed moment shows the need to tell a concise before-method-after story of a client journey?

02 What did the buyer, seller or sponsor actually say or do? Record one concrete example.

02 / THE LEVER

03 When you try to tell a concise before-method-after story of a client journey, 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 is the first visible change in the client's work?

06 How could you replace describing activities without their purpose with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Offer Story

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

07 What must a three-part offer story contain to help the user tell a concise before-method-after story of a client journey? Name the first two decisions it supports.

08 Where might describing activities without their purpose show up? How will you notice it and adjust before a client or buyer is affected?

SCRIPT LAB

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

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What is the first visible change in the client's work? Check: story recall in buyer calls.

ACTION PLAN

Offer Story

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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a three-part offer 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, permissioned buyer or client interaction. 	
05 ADAPT	Review story recall in buyer calls and change one thing. 	

SUCCESS METRIC

Leading signal: story recall in buyer calls. 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 Story

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

MY COMMITMENT

In the next relevant situation, I will use a three-part offer story to tell a concise before-method-after story of a client journey.

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 BUYER OR CLIENT’S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

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