

OVERVIEW

Disqualifier Checklist

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to protect both parties from a poor-fit engagement. Leave with a client disqualifier checklist 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 accepting projects beyond your competence. Review early poor-fit exits 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: protect both parties from a poor-fit engagement?

DEEP WORK I

Disqualifier Checklist

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 protect both parties from a poor-fit engagement?

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

02 / THE LEVER

03 When you try to protect both parties from a poor-fit engagement, 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 make you recommend another provider?

06 How could you replace accepting projects beyond your competence with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Disqualifier Checklist

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

07 What must a client disqualifier checklist contain to help the user protect both parties from a poor-fit engagement? Name the first two decisions it supports.

08 Where might accepting projects beyond your competence show up? How will you notice it and adjust before a client or buyer is affected?

CONVERSATION MAP

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

STAGE	BUYER QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What would make you recommend another provider? Check: early poor-fit exits.

ACTION PLAN

Disqualifier Checklist

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 client disqualifier 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, permissioned buyer or client interaction. 	
05 ADAPT	Review early poor-fit exits and change one thing. 	

SUCCESS METRIC

Leading signal: early poor-fit exits. 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

Disqualifier Checklist

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

MY COMMITMENT

In the next relevant situation, I will use a client disqualifier checklist to protect both parties from a poor-fit engagement.

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.