OVERVIEW

Quarterly Niche Review

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

CLIENT / ACCOUNT	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to decide whether to double down, adjust or abandon a niche. Leave with a quarterly niche decision memo 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 changing direction after one slow week. 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 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: decide whether to double down, adjust or abandon a niche?

DEEP WORK I

Quarterly Niche Review

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 decide whether to double down, adjust or abandon a niche?

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

02 / THE LEVER

03 When you try to decide whether to double down, adjust or abandon a niche, 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 is strong enough to change your focus?

06 How could you replace changing direction after one slow week with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Quarterly Niche Review

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 decide whether to double down, adjust or abandon a niche? Name the first two decisions it supports.

08 Where might changing direction after one slow week show up? How will you notice it and adjust before a client or buyer is affected?

DECISION GRID

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

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: What evidence is strong enough to change your focus? Check: niche-qualified pipeline trend.

ACTION PLAN

Quarterly Niche Review

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 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, permissioned buyer or client 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 Review

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 decide whether to double down, adjust or abandon a niche.

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.