

PRACTICE GROWTH

VOLUME 01

Practice Positioning & Niche

20 ORIGINAL SALES-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 / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to identify the revenue teams with an urgent coaching need. Leave with a one-page ideal client profile 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 treating every sales team as equally suitable. Review qualified inquiry rate 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: identify the revenue teams with an urgent coaching need?

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, sales performance data and coach discovery notes. What observed moment shows the need to identify the revenue teams with an urgent coaching need?

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

02 / THE LEVER

03 When you try to identify the revenue teams with an urgent coaching need, 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 type of revenue team would gain least from your approach?

06 How could you replace treating every sales team as equally suitable 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 the revenue teams with an urgent coaching need? Name the first two decisions it supports.

08 Where might treating every sales team as equally suitable show up? How will you notice it and adjust before a client or buyer 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 type of revenue team would gain least from your approach? Check: qualified inquiry rate.

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, sales performance data and coach discovery notes. 	
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, permissioned buyer or client interaction. 	
05 ADAPT	Review qualified inquiry rate and change one thing. 	

SUCCESS METRIC

Leading signal: qualified inquiry 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

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 the revenue teams with an urgent coaching need.

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.

OVERVIEW

Buyer Role Map

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to distinguish the sponsor, manager and rep buying motives. Leave with a three-role buying-motive map 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 writing one message for three distinct buyers. Review multi-role meeting acceptance 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: distinguish the sponsor, manager and rep buying motives?

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, sales performance data and coach discovery notes. What observed moment shows the need to distinguish the sponsor, manager and rep buying motives?

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

02 / THE LEVER

03 When you try to distinguish the sponsor, manager and rep buying motives, 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 feels the pain but cannot authorize a programme?

06 How could you replace writing one message for three distinct buyers 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 buying-motive map contain to help the user distinguish the sponsor, manager and rep buying motives? Name the first two decisions it supports.

08 Where might writing one message for three distinct buyers show up? How will you notice it and adjust before a client or buyer is affected?

DECISION GRID

Complete five rows while building a three-role buying-motive map. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Who feels the pain but cannot authorize a programme? Check: multi-role meeting acceptance.

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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a three-role buying-motive 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, permissioned buyer or client interaction. 	
05 ADAPT	Review multi-role meeting acceptance and change one thing. 	

SUCCESS METRIC

Leading signal: multi-role meeting acceptance. 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 buying-motive map to distinguish the sponsor, manager and rep buying motives.

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.

OVERVIEW

Sales Problem Inventory

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to rank the observable performance problems clients will pay to address. Leave with a prioritized problem inventory 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 selling coaching before naming the performance gap. Review problem-confirmation rate 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 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: rank the observable performance problems clients will pay to address?

DEEP WORK I

Sales Problem Inventory

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 rank the observable performance problems clients will pay to address?

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

02 / THE LEVER

03 When you try to rank the observable performance problems clients will pay to address, 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 happened in the pipeline that made this urgent now?

06 How could you replace selling coaching before naming the performance gap with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Sales Problem Inventory

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

07 What must a prioritized problem inventory contain to help the user rank the observable performance problems clients will pay to address? Name the first two decisions it supports.

08 Where might selling coaching before naming the performance gap show up? How will you notice it and adjust before a client or buyer is affected?

EXPERIMENT LOG

Complete five rows while building a prioritized 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 happened in the pipeline that made this urgent now? Check: problem-confirmation rate in discovery.

ACTION PLAN

Sales 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a prioritized 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, permissioned buyer or client interaction. 	
05 ADAPT	Review problem-confirmation rate in discovery and change one thing. 	

SUCCESS METRIC

Leading signal: problem-confirmation rate 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

Sales Problem Inventory

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

MY COMMITMENT

In the next relevant situation, I will use a prioritized problem inventory to rank the observable performance problems clients will pay to address.

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.

OVERVIEW

Market Interview Plan

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to ask prospective buyers about behavior rather than opinions. Leave with a ten-interview research plan 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 asking leading questions that flatter the offer. Review completed buyer interviews 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: ask prospective buyers about behavior rather than opinions?

DEEP WORK I

Market Interview Plan

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 ask prospective buyers about behavior rather than opinions?

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

02 / THE LEVER

03 When you try to ask prospective buyers about behavior rather than opinions, 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 buyer do before they searched for help?

06 How could you replace asking leading questions that flatter the offer with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Market Interview Plan

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

07 What must a ten-interview research plan contain to help the user ask prospective buyers about behavior rather than opinions? Name the first two decisions it supports.

08 Where might asking leading questions that flatter the offer show up? How will you notice it and adjust before a client or buyer is affected?

SCRIPT LAB

Complete five rows while building a ten-interview research plan. 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 did the buyer do before they searched for help? Check: completed buyer interviews.

ACTION PLAN

Market 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a ten-interview research plan 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 completed buyer interviews and change one thing. 	

SUCCESS METRIC Leading signal: completed buyer 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

Market 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 plan to ask prospective buyers about behavior rather than opinions.

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.

OVERVIEW

Niche Selection Matrix

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to compare niches by access, urgency, proof and ability to serve. Leave with a weighted niche-selection matrix 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 choosing a niche on market size alone. Review target-account response by niche 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: compare niches by access, urgency, proof and ability to serve?

DEEP WORK I

Niche Selection Matrix

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 compare niches by access, urgency, proof and ability to serve?

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

02 / THE LEVER

03 When you try to compare niches by access, urgency, proof and ability to serve, 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 niche can you credibly help within one quarter?

06 How could you replace choosing a niche on market size alone with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Niche Selection Matrix

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

07 What must a weighted niche-selection matrix contain to help the user compare niches by access, urgency, proof and ability to serve? Name the first two decisions it supports.

08 Where might choosing a niche on market size alone show up? How will you notice it and adjust before a client or buyer is affected?

CONVERSATION MAP

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

STAGE	BUYER QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which niche can you credibly help within one quarter? Check: target-account response by niche.

ACTION PLAN

Niche Selection 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a weighted niche-selection 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, permissioned buyer or client interaction. 	
05 ADAPT	Review target-account response by niche and change one thing. 	

SUCCESS METRIC

Leading signal: target-account response by niche. 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 Selection Matrix

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

MY COMMITMENT

In the next relevant situation, I will use a weighted niche-selection matrix to compare niches by access, urgency, proof and ability to serve.

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.

OVERVIEW

Positioning Statement

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to state audience, problem, method and tangible outcome plainly. Leave with a one-sentence positioning statement 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 claiming guaranteed revenue gains. Review message comprehension in five tests 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: state audience, problem, method and tangible outcome plainly?

DEEP WORK I

Positioning Statement

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 state audience, problem, method and tangible outcome plainly?

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

02 / THE LEVER

03 When you try to state audience, problem, method and tangible outcome plainly, 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: Can a buyer explain your offer after one reading?

06 How could you replace claiming guaranteed revenue gains with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Positioning Statement

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

07 What must a one-sentence positioning statement contain to help the user state audience, problem, method and tangible outcome plainly? Name the first two decisions it supports.

08 Where might claiming guaranteed revenue gains show up? How will you notice it and adjust before a client or buyer is affected?

REALITY SCORECARD

Complete five rows while building a one-sentence 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: Can a buyer explain your offer after one reading? Check: message comprehension in five tests.

ACTION PLAN

Positioning Statement

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 one-sentence 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, permissioned buyer or client interaction. 	
05 ADAPT	Review message comprehension in five tests and change one thing. 	

SUCCESS METRIC
Leading signal: message comprehension in five tests. 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 Statement

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

MY COMMITMENT

In the next relevant situation, I will use a one-sentence positioning statement to state audience, problem, method and tangible outcome plainly.

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.

OVERVIEW

Coaching Method Map

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to translate your coaching process into named client stages. Leave with a four-stage method map 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 using a branded acronym with no useful steps. Review stage-completion rate 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: translate your coaching process into named client stages?

DEEP WORK I

Coaching Method Map

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 translate your coaching process into named client stages?

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

02 / THE LEVER

03 When you try to translate your coaching process into named client stages, 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 changes in a rep's behavior at each stage?

06 How could you replace using a branded acronym with no useful steps with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Coaching 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 translate your coaching process into named client stages? Name the first two decisions it supports.

08 Where might using a branded acronym with no useful steps show up? How will you notice it and adjust before a client or buyer 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 changes in a rep's behavior at each stage? Check: stage-completion rate.

ACTION PLAN

Coaching 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, sales performance data and coach discovery notes. 	
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, permissioned buyer or client interaction. 	
05 ADAPT	Review stage-completion rate and change one thing. 	

SUCCESS METRIC

Leading signal: stage-completion 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

Coaching 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 translate your coaching process into named client stages.

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.

OVERVIEW

Proof Point Library

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

CLIENT / ACCOUNT	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to collect permissioned examples of changed sales behavior. Leave with a proof-point evidence library 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 sharing confidential customer details. Review usable permissioned case examples 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: collect permissioned examples of changed sales behavior?

DEEP WORK I

Proof Point Library

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 collect permissioned examples of changed sales behavior?

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

02 / THE LEVER

03 When you try to collect permissioned examples of changed sales behavior, 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 supports this claim without exposing a client?

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

DEEP WORK II + WORKSHEET

Proof Point Library

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

07 What must a proof-point evidence library contain to help the user collect permissioned examples of changed sales behavior? Name the first two decisions it supports.

08 Where might sharing confidential customer details show up? How will you notice it and adjust before a client or buyer is affected?

DECISION GRID

Complete five rows while building a proof-point evidence library. 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 supports this claim without exposing a client? Check: usable permissioned case examples.

ACTION PLAN

Proof Point Library

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 proof-point evidence 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, permissioned buyer or client interaction. 	
05 ADAPT	Review usable permissioned case examples and change one thing. 	

SUCCESS METRIC

Leading signal: usable permissioned case 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

Proof Point Library

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

MY COMMITMENT

In the next relevant situation, I will use a proof-point evidence library to collect permissioned examples of changed sales behavior.

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.

OVERVIEW

Outcome Claim Audit

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to separate controllable behaviors from uncontrollable deal results. Leave with a claims-and-evidence audit 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 promising close rates without baseline data. Review substantiated claims ratio 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: separate controllable behaviors from uncontrollable deal results?

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, sales performance data and coach discovery notes. What observed moment shows the need to separate controllable behaviors from uncontrollable deal results?

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

02 / THE LEVER

03 When you try to separate controllable behaviors from uncontrollable deal results, 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 outcome can you measure and influence directly?

06 How could you replace promising close rates without baseline data 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 audit contain to help the user separate controllable behaviors from uncontrollable deal results? Name the first two decisions it supports.

08 Where might promising close rates without baseline data show up? How will you notice it and adjust before a client or buyer is affected?

EXPERIMENT LOG

Complete five rows while building a claims-and-evidence audit. 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: Which outcome can you measure and influence directly? Check: substantiated claims ratio.

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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a claims-and-evidence audit 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 substantiated claims ratio and change one thing. 	

SUCCESS METRIC

Leading signal: substantiated claims ratio. 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 audit to separate controllable behaviors from uncontrollable deal results.

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.

OVERVIEW

Competitor Alternative Map

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to compare coaching with training, tooling and doing nothing. Leave with an alternative-choice comparison 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 attacking competing providers. Review no-decision objections surfaced 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: compare coaching with training, tooling and doing nothing?

DEEP WORK I

Competitor Alternative Map

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 compare coaching with training, tooling and doing nothing?

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

02 / THE LEVER

03 When you try to compare coaching with training, tooling and doing nothing, 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: Why might doing nothing feel safer to this buyer?

06 How could you replace attacking competing providers with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Competitor Alternative Map

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

07 What must an alternative-choice comparison contain to help the user compare coaching with training, tooling and doing nothing? Name the first two decisions it supports.

08 Where might attacking competing providers show up? How will you notice it and adjust before a client or buyer is affected?

SCRIPT LAB

Complete five rows while building an alternative-choice comparison. 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: Why might doing nothing feel safer to this buyer? Check: no-decision objections surfaced.

ACTION PLAN

Competitor 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft an alternative-choice comparison 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 no-decision objections surfaced and change one thing. 	

SUCCESS METRIC

Leading signal: no-decision objections surfaced. 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

Competitor Alternative Map

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

MY COMMITMENT

In the next relevant situation, I will use an alternative-choice comparison to compare coaching with training, tooling and doing nothing.

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.

OVERVIEW

Trigger Event List

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to identify events that make sales coaching timely. Leave with a trigger-event watchlist 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 using generic urgency without evidence. Review relevant event-led conversations 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: identify events that make sales coaching timely?

DEEP WORK I

Trigger Event List

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 identify events that make sales coaching timely?

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

02 / THE LEVER

03 When you try to identify events that make sales 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 would cause this buyer to act this month?

06 How could you replace using generic urgency without evidence with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Trigger Event List

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 identify events that make sales coaching timely? Name the first two decisions it supports.

08 Where might using generic urgency without evidence show up? How will you notice it and adjust before a client or buyer is affected?

CONVERSATION MAP

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

STAGE	BUYER QUESTION	YOUR MOVE	PROOF
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which event would cause this buyer to act this month? Check: relevant event-led conversations.

ACTION PLAN

Trigger Event List

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 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, permissioned buyer or client interaction. 	
05 ADAPT	Review relevant event-led conversations and change one thing. 	

SUCCESS METRIC

Leading signal: relevant event-led 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

Trigger Event List

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 identify events that make sales 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 BUYER OR CLIENT’S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

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

OVERVIEW

Vertical Language Bank

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to learn the words buyers use for pipeline and conversion issues. Leave with an industry-language bank 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 inventing jargon the team never uses. Review buyer-word reuse rate 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: learn the words buyers use for pipeline and conversion issues?

DEEP WORK I

Vertical Language Bank

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 learn the words buyers use for pipeline and conversion issues?

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

02 / THE LEVER

03 When you try to learn the words buyers use for pipeline and conversion issues, 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 phrase did a buyer use that you should repeat verbatim?

06 How could you replace inventing jargon the team never uses with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Vertical Language Bank

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

07 What must an industry-language bank contain to help the user learn the words buyers use for pipeline and conversion issues? Name the first two decisions it supports.

08 Where might inventing jargon the team never uses show up? How will you notice it and adjust before a client or buyer is affected?

REALITY SCORECARD

Complete five rows while building an industry-language bank. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which phrase did a buyer use that you should repeat verbatim? Check: buyer-word reuse rate.

ACTION PLAN

Vertical 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft an industry-language bank 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 buyer-word reuse rate and change one thing. 	

SUCCESS METRIC

Leading signal: buyer-word reuse 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

Vertical Language Bank

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

MY COMMITMENT

In the next relevant situation, I will use an industry-language bank to learn the words buyers use for pipeline and conversion issues.

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.

OVERVIEW

Differentiation Test

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to verify that your difference matters to an actual buyer. Leave with a buyer-tested differentiation card 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 confusing a feature with a differentiator. Review buyer-rated relevance score 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: verify that your difference matters to an actual buyer?

DEEP WORK I

Differentiation Test

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 verify that your difference matters to an actual buyer?

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

02 / THE LEVER

03 When you try to verify that your difference matters to an actual buyer, 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: Would this buyer pay for the difference you named?

06 How could you replace confusing a feature with a differentiator 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 buyer-tested differentiation card contain to help the user verify that your difference matters to an actual buyer? Name the first two decisions it supports.

08 Where might confusing a feature with a differentiator show up? How will you notice it and adjust before a client or buyer is affected?

EVIDENCE AUDIT

Complete five rows while building a buyer-tested differentiation 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: Would this buyer pay for the difference you named? Check: buyer-rated relevance score.

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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a buyer-tested differentiation 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, permissioned buyer or client interaction. 	
05 ADAPT	Review buyer-rated relevance score and change one thing. 	

SUCCESS METRIC

Leading signal: buyer-rated relevance score. 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 buyer-tested differentiation card to verify that your difference matters to an actual buyer.

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.

OVERVIEW

Coaching Versus Training

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to explain when practice and feedback beat a one-off workshop. Leave with a comparison one-pager 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 suggesting training is never useful. Review coaching-fit conversations 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: explain when practice and feedback beat a one-off workshop?

DEEP WORK I

Coaching Versus Training

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 explain when practice and feedback beat a one-off workshop?

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

02 / THE LEVER

03 When you try to explain when practice and feedback beat a one-off workshop, 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 skill needs repeated rehearsal rather than more information?

06 How could you replace suggesting training is never useful with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Coaching Versus Training

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

07 What must a comparison one-pager contain to help the user explain when practice and feedback beat a one-off workshop? Name the first two decisions it supports.

08 Where might suggesting training is never useful show up? How will you notice it and adjust before a client or buyer is affected?

DECISION GRID

Complete five rows while building a comparison one-pager. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which skill needs repeated rehearsal rather than more information? Check: coaching-fit conversations.

ACTION PLAN

Coaching Versus Training

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 comparison one-pager 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 coaching-fit conversations and change one thing. 	

SUCCESS METRIC

Leading signal: coaching-fit 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

Coaching Versus Training

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

MY COMMITMENT

In the next relevant situation, I will use a comparison one-pager to explain when practice and feedback beat a one-off workshop.

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.

OVERVIEW

Sales Coach Bio

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to link relevant experience to client problems without exaggeration. Leave with a credible short coach bio 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 listing credentials without buyer relevance. Review bio-to-meeting conversion 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: link relevant experience to client problems without exaggeration?

DEEP WORK I

Sales Coach Bio

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 link relevant experience to client problems without exaggeration?

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

02 / THE LEVER

03 When you try to link relevant experience to client problems without exaggeration, 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 can you prove you have helped someone do?

06 How could you replace listing credentials without buyer relevance with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Sales Coach Bio

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

07 What must a credible short coach bio contain to help the user link relevant experience to client problems without exaggeration? Name the first two decisions it supports.

08 Where might listing credentials without buyer relevance show up? How will you notice it and adjust before a client or buyer is affected?

EXPERIMENT LOG

Complete five rows while building a credible short coach bio. 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 can you prove you have helped someone do? Check: bio-to-meeting conversion.

ACTION PLAN

Sales Coach Bio

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 credible short coach bio 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 bio-to-meeting conversion and change one thing. 	

SUCCESS METRIC Leading signal: bio-to-meeting conversion. 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

Sales Coach Bio

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

MY COMMITMENT

In the next relevant situation, I will use a credible short coach bio to link relevant experience to client problems without exaggeration.

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.

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.

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.

OVERVIEW

Geography Adaptation

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

CLIENT / ACCOUNT	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to adapt English sales language across US, UK and Gulf contexts. Leave with a region-neutral language 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 assuming one market's terminology is universal. Review regional comprehension test 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: adapt English sales language across US, UK and Gulf contexts?

DEEP WORK I

Geography Adaptation

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 adapt English sales language across US, UK and Gulf contexts?

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

02 / THE LEVER

03 When you try to adapt English sales language across US, UK and Gulf contexts, 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 or phrase needs local validation?

06 How could you replace assuming one market's terminology is universal with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Geography Adaptation

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

07 What must a region-neutral language checklist contain to help the user adapt English sales language across US, UK and Gulf contexts? Name the first two decisions it supports.

08 Where might assuming one market's terminology is universal show up? How will you notice it and adjust before a client or buyer is affected?

REALITY SCORECARD

Complete five rows while building a region-neutral language checklist. Use only approved, non-sensitive examples.

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

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which claim or phrase needs local validation? Check: regional comprehension test.

ACTION PLAN

Geography Adaptation

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 region-neutral language 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 regional comprehension test and change one thing. 	

SUCCESS METRIC

Leading signal: regional comprehension test. 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

Geoghy Adaptation

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

MY COMMITMENT

In the next relevant situation, I will use a region-neutral language checklist to adapt English sales language across US, UK and Gulf contexts.

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.

OVERVIEW

Positioning Feedback Test

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

CLIENT / ACCOUNT

COACH

SESSION DATE

PURPOSE

Use this coaching worksheet to run five unbiased buyer readbacks of your positioning. Leave with a five-buyer feedback log 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 explaining the offer during the test. Review accurate buyer readbacks 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: run five unbiased buyer readbacks of your positioning?

DEEP WORK I

Positioning Feedback Test

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 run five unbiased buyer readbacks of your positioning?

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

02 / THE LEVER

03 When you try to run five unbiased buyer readbacks of your positioning, 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 think you sell before you clarified it?

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

DEEP WORK II + WORKSHEET

Positioning Feedback Test

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

07 What must a five-buyer feedback log contain to help the user run five unbiased buyer readbacks of your positioning? Name the first two decisions it supports.

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

EVIDENCE AUDIT

Complete five rows while building a five-buyer feedback 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 think you sell before you clarified it? Check: accurate buyer readbacks.

ACTION PLAN

Positioning Feedback 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, sales performance data and coach discovery notes. 	
02 BUILD	Draft a five-buyer feedback 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, permissioned buyer or client interaction. 	
05 ADAPT	Review accurate buyer readbacks and change one thing. 	

SUCCESS METRIC

Leading signal: accurate buyer 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

COMMITMENT & FIELD NOTES

Positioning Feedback Test

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

MY COMMITMENT

In the next relevant situation, I will use a five-buyer feedback log to run five unbiased buyer readbacks of your positioning.

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.

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.