3.3 Coaching Delivery Formats

CGN coaching is designed to be flexible, accessible, and effective:

- **One-on-One Coaching**
  - Confidential sessions focused on individual goals.
  - Deep dive into challenges, strategies, and live deals.
- **Small Group Coaching**
  - Peer-learning dynamic (3–6 participants).
  - Builds accountability and collaborative problem-solving.
- **Blended Coaching Programs**
  - Combine training workshops with ongoing coaching support.
  - Example: A 90-day coaching cycle following a training engagement.
- **Virtual & In-Person Options**
  - Virtual sessions via Zoom or Teams for convenience.
  - On-site coaching for direct team engagement.

3.4 ROI of Coaching

Coaching is a force multiplier. While training sparks change, coaching sustains it.
Organizations investing in ROOTS coaching can expect:

- **Higher Sales Performance** – reps applying training consistently improve close ratios and deal size.
- **Stronger Retention** – coached employees are more engaged and less likely to leave.
- **Leadership Readiness** – high performers become leaders faster and with greater effectiveness.
- **Sustained ROI** – coaching ensures training results stick, closing the "knowing–doing gap."

3.5 Coaching Execution Guide (ROOTS in Action)

ROOT coaching ensures that training knowledge becomes long-term behavior and measurable performance. This execution guide provides structure for CGN coaches and clarity for participants.

3.5.1 Coaching Purpose

The goal of coaching is to:

- Reinforce knowledge gained through SEEDS training.
- Unlock individual potential by addressing specific challenges.
- Provide accountability for execution and results.
- Support career and leadership development.

3.5.2 Coaching Structure

Each coaching engagement follows a four-stage process:

1. **Diagnostic Session (Baseline)**
    - Intake assessment (goals, strengths, challenges).
    - Establish growth targets.
    - Build rapport between coach and participant.
2. **Ongoing Sessions (Weekly or Bi-Weekly)**
    - Duration: 45–60 minutes.
    - Format: Virtual or in-person.
    - Flow: Review progress → Problem-solve live challenges → Reinforce skills → Set commitments.
3. **Checkpoint Reviews (Every 4–6 Weeks)**
    - Measure performance against goals.
    - Adjust strategies as needed.
    - Document measurable improvements (pipeline growth, conversion, confidence).
4. **Final Review & Transition**
    - Celebrate results.
    - Identify future growth opportunities.
    - Transition to next-level coaching or self-managed development.

3.5.3 Coaching Tools & Templates

- **Coaching Intake Form** – baseline goals, aspirations, and challenges.
- **Session Agenda Template** – standard structure for every coaching session.
- **Progress Tracker** – log commitments, wins, and roadblocks.

- **360 Feedback Template** – optional peer/manager/client feedback.
- **Reflection Journal** – participant logs wins, lessons, and mindset shifts.

3.5.4 Coaching Methodologies

- **Question-Based Coaching** – uncover insights by asking powerful, open-ended questions.
- **Accountability Partnering** – close each session with clear commitments.
- **Strengths-Based Focus** – build on what participants already do well.
- **Behavioral Anchoring** – tie lessons to real sales activities (calls, proposals, deals).

3.5.5 Reinforcement & Accountability

- **Weekly Check-ins** (email or text).
- **Coaching Sprints** – short-term focus on one skill (2–3 weeks).
- **Performance Dashboards** – track activities and results visually.
- **Peer Coaching Groups** – optional support from other participants.

3.5.6 Sample Coach's Script

Opening: "Welcome back. Last session you committed to testing two new discovery questions with your top prospect. How did it go?"
Review: Affirm wins and explore challenges.
Focus: Introduce today's coaching theme (e.g., objection handling) and apply it to current deals.
Commitments: "What 2–3 actions will you take before our next session?"
Closing: Encourage, confirm accountability, and restate next session's focus.

3.5.7 The ROOTS Coaching Framework (1:1 & Small Group)
The ROOTS system ensures coaching provides stability, accountability, and long-term growth for individuals and small teams. Each letter represents a pillar of personal and professional development:

- **R – Relationships**
  Building trust, communication, and accountability between coach and participant(s).
  In small groups: encouraging peer accountability and collaborative problem-solving.

- **O – Organization**
  Structuring time, priorities, and workflow for consistent performance.
  In groups: clarifying roles, responsibilities, and rhythms (routines, meetings, habits).
- **O – Objectives**
  Defining clear, achievable goals that connect daily work to long-term sales success.
- **T – Training**
  Reinforcing sales skills and leadership behaviors through practical application.
  Focused, just-in-time skill boosts for current opportunities.
- **S – Systems**
  Simple, repeatable practices (trackers, checklists, dashboards) that reinforce habits and measure progress.

ROOTS builds the hidden strength beneath performance. While BRANCH focuses on organizational systems and outward growth, ROOTS ensures individuals and small groups have the personal alignment and resilience to sustain results.

Section 3.6 Draft: Measuring Growth with ROOTS KPIs

Why Metrics Matter
Healthy roots can't be seen, but their strength shows in the fruit. The same is true in sales: you may not always see the daily grind, but you can measure its impact. Metrics (or Key Performance Indicators—KPIs) give you proof that your foundation is working, even when results feel slow.

Core Individual Sales KPIs (universal, even if a company doesn't track them):

1. **Daily Outreach Activity** – # of calls, emails, LinkedIn touches, or conversations initiated.
2. **New Prospects Added to Pipeline** – fresh "seeds" planted weekly.
3. **Appointments / Discovery Meetings Set** – real engagement, not just activity.
4. **Conversion Rates** – % of prospects that move from stage to stage (call → meeting, meeting → proposal, proposal → close).
5. **Sales Cycle Time** – average days from first contact to closed deal.
6. **Average Deal Size** – tracking growth in quality of opportunities.
7. **Win Rate** – % of closed-won deals compared to total proposals.
8. **Referral Rate** – how many clients recommend you or bring repeat business.
9. **Follow-Up Consistency** – touches made post-meeting or post-sale.
10. **Revenue Contribution** – weekly or monthly sales produced.

Callout Box: ROOTS KPI Tracker
(can be formatted in a worksheet later)

- 🌱 *Daily Goal:* 5 new touches

- 🌿 *Weekly Goal:* 3 new appointments
- 🌳 *Monthly Goal:* X proposals delivered, Y new clients added
- 🌟 *Quarterly Goal:* Track win rate and revenue vs. goal

Trainer Note / Coaching Script
"Think of KPIs as soil tests for your sales garden. They tell you if the environment is fertile or needs adjusting. By tracking your own numbers, you take control of your growth instead of waiting for someone else to measure it."

ROOTS Coaching Diagnostic Tools & Worksheets

Tool 1: Coaching Intake Form

Purpose: Establish baseline goals and challenges.

- Current role & responsibilities
- Strengths (self-identified)
- Top 3 challenges
- Career aspirations
- One skill you most want to improve
- Preferred learning style (hands-on, reflective, visual, etc.)

Tool 2: Self-Assessment Survey

Purpose: Baseline awareness of mindset, accountability, and confidence.
Scale: **1 (Strongly Disagree) – 5 (Strongly Agree)**

1. I consistently apply what I learn in training.
2. I maintain strong discipline in daily sales activities.
3. I am confident when engaging prospects and clients.
4. I hold myself accountable to goals and commitments.
5. I see myself as a future leader within my organization.

Scoring:

- **20–25:** Strong performer, ready for leadership.
- **15–19:** Solid foundation, needs coaching reinforcement.
- **Below 15:** Requires mindset and accountability focus.

Tool 3: Coaching Session Agenda Template

- **Opening:** Review commitments from prior session.
- **Focus:** Discuss today's priority challenge.
- **Application:** Role-play or live scenario coaching.

- **Commitments:** 2–3 clear actions before next session.
- **Closing:** Encourage, restate accountability.

Tool 4: Progress Tracker

Columns:

- Date of Session
- Commitments Made
- Outcomes Achieved
- Barriers Encountered
- Adjustments Needed

Tool 5: Reflection Journal

Prompts for participants to complete weekly:

- My biggest win this week was…
- A challenge I faced was…
- One skill I applied from coaching was…
- My focus for next week is…

🌱 ROOTS KPI Tracker Worksheet

Purpose:
Your roots grow stronger when you can measure them. This tracker helps you monitor the *inputs* and *outcomes* that determine sales success. Use it weekly to stay accountable and make sure your foundation supports growth.

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1. Daily Activity Tracker (5x5 Rule 🌿)

Goal: Plant 5 new seeds a day — outreach touches that keep your pipeline alive.

Day	Calls Made	Emails Sent	LinkedIn / Social	Referrals Asked	Total New Touches	Notes / Wins
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						

✅ **Weekly Target:** 25 touches minimum

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2. Weekly Growth Metrics

Measure the sprouts, not just the seeds.

Metric	This Week Goal	Notes / Insights
New Prospects Added		
Discovery Meetings Set		
Proposals / Presentations Made		
Deals Closed (Won)		
Referral Requests Made		
Referrals Received		

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3. Conversion Ratios 🌳

How many seeds are actually taking root?

- Touches → Meetings: _____ %
- Meetings → Proposals: _____ %
- Proposals → Wins: _____ %
- Win Rate (total): _____ %

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4. Monthly Snapshot 🌟

Step back and see the bigger picture.

- Average Deal Size: _____

- Total Revenue Closed: _____
- Sales Cycle (avg days): _____
- Follow-Up Consistency (Y/N): _____

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5. Reflection & Adjustment

The soil check — what needs watering, pruning, or fertilizing?

1. **What went well this week?**

   ---

2. **What habit or activity needs strengthening?**

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3. **One thing I will do differently next week is…**

💡 **Trainer Tip / Script:**
"Tracking doesn't just show progress — it builds confidence. When your ROOTS are healthy, your branches will grow naturally. Every call, every touch, every follow-up is a seed planted for your future harvest."

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create a **condensed 1-page version** of this (something salespeople could realistically carry and fill out each week)

Chapter 4 – Consulting Framework (BRANCH & Growth Map)

Consulting is the BRANCH system of CGN — extending reach, creating leverage, and enabling organizations to grow beyond individual training or coaching. BRANCH focuses on **systems, processes, and culture** that sustain high performance across the organization.

4.1 Philosophy of Consulting

At CGN, consulting is about transformation, not just advice.
We partner with organizations to:

- Diagnose inefficiencies and "defects" in their sales processes.
- Design solutions that align people, processes, and tools.
- Implement changes that are scalable and measurable.
- Create a culture of accountability and growth.

4.2 The Growth Map Framework

The Growth Map is CGN's consulting framework for organizational transformation.
It charts four critical stages:

1. **Current State (Assessment)** – Where the organization is today.
2. **Desired State (Vision)** – Where leadership wants to be.
3. **Barriers (Obstacles)** – What prevents progress.
4. **Path Forward (Solutions)** – The plan to reach sustainable growth.

4.3 Application of Six Sigma (DMAIC)

The Growth Map integrates Six Sigma methodologies (DMAIC) to ensure solutions are not just conceptual, but measurable and sustainable:

- **Define:** Identify the challenge or performance gap.

- **Measure:** Gather data on processes and outcomes.
- **Analyze:** Identify root causes of inefficiencies.
- **Improve:** Implement optimized systems and solutions.
- **Control:** Monitor progress to sustain improvements.

Application of DMAIC (Consulting Standard)

- At the beginning of every consultation, DMAIC (Define–Measure–Analyze–Improve–Control) will be applied.
- Purpose: ensure the consultation focuses on the *right areas* from the start.
- The **length of time** spent in DMAIC depends on:
  - Scope of the contract.
  - Size and complexity of the organization.
- Defined during contract setup, so expectations are clear from the outset.

4.4 Consulting Offerings

CGN consulting engagements may include:

- **Sales Process Optimization** – Refining customer journey and pipeline.
- **Sales Enablement Strategy** – Tools, content, and resources.
- **Compensation & Incentives** – Aligning pay structures with outcomes.
- **Culture & Team Dynamics** – Shaping collaborative, performance-driven environments.

4.5 Consulting Delivery Process (The BRANCH System)

CGN consulting engagements are delivered through the **B.R.A.N.C.H. system** — our signature, branded delivery cycle. BRANCH ensures that every engagement is structured, results-driven, and aligned with organizational growth.

B – Benchmark

- Establish baselines by assessing current processes, culture, and performance.
- Conduct surveys, data audits, and stakeholder interviews to capture the “as-is” state.

R – Reveal

- Identify gaps, inefficiencies, and barriers to growth.

- Use diagnostic tools (Growth Map, Culture Health Index, Sales Process Mapping) to highlight challenges.

A – Align

- Connect organizational goals and leadership vision with the Growth Map framework.
- Prioritize initiatives and design strategies that fit the business's unique needs.

N – Navigate

- Chart the roadmap forward by defining phased implementation steps.
- Develop timelines, ownership, and success measures.

C – Cultivate

- Implement solutions across people, processes, and tools.
- Reinforce adoption through enablement, coaching, and cultural integration.

H – Harvest

- Measure outcomes, track ROI, and celebrate wins.
- Establish systems for sustainment (KPIs, dashboards, reviews, playbooks).

4.6 Consulting Execution Guide (BRANCH in Action)

4.6.1 Purpose

To transform organizational sales performance through system-wide optimization, measurable ROI, and cultural alignment.

4.6.2 Structure of Engagements (Mapped to BRANCH)

1. **Benchmark & Reveal (Diagnostic Assessment)**
    - Conduct surveys, stakeholder interviews, and data audits.
    - Use the Growth Map to clarify current vs. desired state.
    - Highlight cultural and process gaps that must be addressed.
2. **Align & Navigate (Consulting Sessions & Strategy)**
    - Kickoff alignment session with leadership.
    - Facilitate workstream sessions for process mapping, enablement, and design.
    - Co-create a roadmap that balances quick wins with long-term impact.
3. **Cultivate (Implementation Phase)**

    - Pilot improvements with select teams.
    - Roll out systems, enablement, and cultural practices across the organization.
    - Provide coaching to ensure adoption and execution discipline.
4. **Harvest (Sustainment & Control)**
    - Establish KPIs and dashboards to monitor results.
    - Conduct monthly/quarterly reviews with leadership (QBRs).
    - Offer optional ongoing advisory retainers to reinforce growth.

4.6.3 Consulting Tools & Templates

- Growth Diagnostic Survey → Benchmark/Reveal.
- Sales Process Mapping → Reveal/Align.
- Enablement Audit → Reveal/Align.
- Compensation Alignment → Align/Navigate.
- Culture Health Index → Benchmark/Reveal/Harvest.

4.6.4 Methodologies in Practice

- **Six Sigma (DMAIC):** Ensures BRANCH solutions are measurable and sustainable.
- **The Growth Map:** Provides clarity between current state, barriers, and path forward.
- **Change Management Principles:** Reinforce adoption at the cultural level.

4.6.5 Reinforcement & Accountability

- Quarterly Business Reviews (Harvest) → Track results against objectives.
- Executive Coaching (Cultivate/Harvest) → Equip leaders to manage change.
- Sustainment Playbooks (Harvest) → Enable internal leaders to continue application.

4.6.6 Sample Consultant Script (Kickoff)

- **Opening:** "Our BRANCH system is designed to extend your organization's reach, create leverage, and cultivate long-term growth. We don't just provide advice — we co-create systems and culture that drive measurable sales performance."
- **Diagnostic Discussion (Benchmark & Reveal):** "What are the biggest roadblocks between where you are now and where you want to be?"
- **Bridge to Solutions (Align & Navigate):** "We'll map your current state, align your vision, and chart a path forward that removes obstacles."

- **Closing (Cultivate & Harvest):** "Together, we'll implement solutions and ensure they last, so your organization can grow stronger season after season."

Disclaimer: *DMAIC (Define–Measure–Analyze–Improve–Control) is a core methodology of Six Sigma, originally developed by Motorola and further advanced by GE and other organizations. CGN does not claim ownership of DMAIC. Our consulting frameworks (Growth Map and BRANCH) incorporate DMAIC principles to ensure that solutions are measurable, data-driven, and sustainable.*

Consulting Diagnostic Tools & Templates

Tool 1: Growth Diagnostic Survey (Leadership & Sales Team)

Purpose: Baseline assessment of organizational health, sales processes, and growth readiness.

Instructions for Participants:
Rate each statement on a scale of **1 (Strongly Disagree)** to **5 (Strongly Agree).**

1. Our sales process is clearly defined and consistently followed.
2. We have a reliable system for generating high-quality leads.
3. Sales enablement tools (CRM, content, playbooks) are effectively used by our team.
4. Our compensation structure motivates the right behaviors.
5. Cross-department collaboration (sales, marketing, operations) is strong.
6. Leadership provides clear vision and direction for sales growth.
7. We have a culture that encourages accountability and continuous improvement.
8. Sales training translates into consistent, applied performance.
9. We track and measure KPIs that matter most to growth.
10. Our team is confident in achieving long-term sales goals.

Scoring:

- **40–50:** Strong foundation, focus on fine-tuning.
- **25–39:** Moderate foundation, several gaps need addressing.

- **Below 25:** Major challenges; urgent systemic improvements required.

Tool 2: Sales Process Mapping Worksheet

Purpose: Compare "As-Is" vs. "To-Be" processes.

Step 1 – Document the Current State ("As-Is"):

- Lead generation → Qualification → Discovery → Proposal → Close → Follow-Up.
- List what currently happens at each step.

Step 2 – Define the Desired State ("To-Be"):

- Describe the ideal flow that reduces friction and increases conversion.

Step 3 – Identify Gaps:

- What slows down the process?
- Where do prospects drop off?
- What steps create confusion or duplicate effort?

Step 4 – Solutions:

- Outline improvements, tools, or behaviors needed at each step.

Tool 3: Enablement Audit Checklist

Purpose: Evaluate tools, content, and resources available to sales teams.

Check each as **Available, Effective, or Missing.**

- CRM (Customer Relationship Management system)
- Sales Playbooks / Scripts
- Proposal Templates
- Case Studies / Testimonials
- Training Programs
- Reporting & Dashboards
- Coaching / Mentorship Programs