



SOLID

Practice Development

Introduction

Since 1989, SOLID has provided over 200 senior executives with practice development coaching. We have helped many executives make a successful transition from long-term corporate careers into private consulting or training practices, partnerships or other firm-type environments. Most clients have gone into executive coaching, corporate training, and/or management or business consulting.

Practice Development Plan

Once complete, this document will represent the scope of the executive coaching engagement. However, SOLID will provide all available coaching services to you, in addition to those contained in this scope of work. (See www.solidcoaching.com for a comprehensive list of all SOLID's executive coaching, training and consulting services.) Following is a list of milestones which will eventually contain a estimated timeline for a practice development engagement at SOLID.

Overview of a Practice Development Coaching Services

The first draft of this assessment is completed prior to beginning a coaching engagement. Next, you and I meet to discuss, add additional items, modify and further prioritize this document. By the end of the assessment period (Phase 1: Assessment), a more refined list of coaching topics will be identified, milestones set and metrics determined for measuring progress. Next, we will fine-tune this assessment of need, further customizing the coaching to enable you to achieve your high priority goals (Phase II: Goals). During Phase I and Phase II, we immediately begin working to advance toward your initial goals. However, after completion of Phase II, focus intensifies on advancement toward goal attainment (Phase III: Executive Advancement). Also, every time a goal is achieved, coaching is provided to help capitalize on these accomplishments. There is a seamless flow back and forth between Phase III and Phase IV. (Phase IV: Executive Development). During Phase IV, the client internalizes the changes and begins to attain the majority of the initial goals for the coaching engagement. Last, after the engagement is completed, there are several annual follow up meetings. (Phase V: Post-Coaching Engagement Follow Up) This is included at no additional charge, and is designed to further ensure that you continue to achieve your goals long after successful conclusion of your coaching engagement. During these sessions, progress is reviewed, and on-going coaching goals discussed.



In summary, the key points are:

1. Your coaching is unique to you; tailored focus meets your individual needs and maximizes results.
2. Your coaching is not Phase-dependent; meaningful, Phase IV development work begins day one.
3. Our follow up and accountability serve to ensure that you continue to achieve long-term success.

Resources

SOLID will provide resources for this engagement, including the following:

1. Three ring binder with tabbed index supplying useful tools for Phase I through Phase V
2. Lending library of over 2,000 books, booklets, articles, tools, forms and handouts.
3. Website (www.solidcoaching.com) for easy access to key resources
4. Hundreds of available assessment instruments, profiles and tests
5. Selected readings from other experts in the area of practice development, including:

Block, Peter: *Flawless Consulting, Second Edition: A Guide to Getting Your Expertise Used*, Peter Block & Jossey-Bass/Pfeiffer, 2000.

Weiss, Alan: *Million Dollar Consulting: The Professionals Guide to Growing a Practice*, The McGraw-Hill Companies, 2003.

Weiss, Alan: *How to Acquire Clients: Powerful Techniques for the Successful Practitioner*, Jossey-Bass/ Pfeiffer, 2002.

McQuown, Judith: *Inc. Yourself: How To Profit By Setting Up Your Own Corporation*, Judith H. McQuown & Co., Inc., 2004.

Willingham, Ron: *Integrity Selling for the 21st Century*, Ron Willingham, 2003.



Overview of the Practice Development Assessment

The following assessment provides three key functions. One, it is a briefing on frequently requested practice development coaching topics. Two, it will assess your needs. Three, it will provide the framework for a tailored and prioritized scope of work between you and your coach.

Now follow the instructions found in the next two sections on the following pages: 1) Specialized Client Objectives; and 2) Generalized Client Objectives.

Specialized Client Objectives: Current Key Needs

Specialized Client Objectives are your current key needs in the area of practice development skill development.

Instructions:

- 1. Brainstorm a list of ten to fifteen current key needs that may be addressed through work with your practice development coach. Be as specific as possible.
2. Review your list, make edits and add any additional key needs that come to mind during the process. Next, assign a priority code for all identified areas: AA = Very High; A = High; B = Moderate; C = Low.
3. Evaluate this list with your coach, and re-prioritize your specialized objectives based upon the feedback you receive from your coach, combined with your own and other thoughts as you review your objectives for coaching.
4. Include additional input from coaching session work, a 360 degree assessment, or any other relevant assessments you may have completed.

Following is space to capture your objectives for improvement in this area.

Four rows of horizontal lines for writing, each preceded by a small square checkbox.

Analyze past successes and failures as Related to Opening up a Private Practice

- _____ Process past issues
- _____ Obtain analysis of strengths and weaknesses through the 360° Assessment
- _____ Obtain assessment of skills through written tests/profiles
- _____ _____
- _____ _____

Increase Awareness of Work Behavioral Style When Beginning New Role

- _____ Develop competency in administering/interpreting behavioral assessments
- _____ Learn adaptive behaviors to adjust behavioral style to meet Clients' needs
- _____ Review personal work behavioral style and potential problems it may create in new role
- _____ _____
- _____ _____

Assessment of Client Needs

- _____ Gain access and learn use of performance measurement tools and assessments
- _____ Develop an assessment product suite and service offering
- _____ Learn relevant best practices for assessment administration, scoring and interpretation
- _____ _____
- _____ _____

Gaining Credibility and Getting Expertise Used

- _____ Develop better consensus and alignment among stakeholders
- _____ Relationship management; relationship building; strategic relationship development
- _____ Expand/grow influence throughout: 1. the organization; 2. area(s) of responsibility
- _____ _____
- _____ _____

Gain Greater Insight and Depth of Learning About Client

- Brainstorm strategies to quickly acquire and assimilate information on Client
- Learn best practice use of Requests for Information to uncover needs/opportunities
- Quickly analyze strengths/weaknesses of Client
- _____
- _____

Develop a Strategy to Efficiently Learn the Products and/or Services

- Develop a plan to rapidly come up to speed
- Determine and prioritize needed product knowledge training
- Ways to leverage knowledge of Client's superiors, peers, subordinates and customers
- _____
- _____

Gain a Sounding Board for Political, Organizational Issues

- Gain advanced coaching on organizational politics from the consultant's vantage point
- Manage political relationships; gain better ability to avoid political 'landmines'
- Methods to gain insight into organizational politics and political positioning issues
- _____
- _____

Brainstorm Ideas for Initiating a Planning Process

- Learn advanced strategic planning methodologies specific to the consultant's role
- Utilize coaching as an OD initiative; add on strategic planning to an initial engagement.
- Brainstorm possible strategies to enhance overall planning
- _____

Receive Priority and Time Management Coaching

- _____ Enhance effectiveness of one-on-ones with Clients
- _____ Gain advanced priority management coaching specific to a consultant or coach
- _____ Develop a sustainable, “balanced-life” pace in new role as a consultant, coach or trainer
- _____ _____
- _____ _____

Sales for the Private Practitioner

- _____ Identifying client needs
- _____ Assessment tools for selling services
- _____ Principles of consultative selling
- _____ _____
- _____ _____

Proposal Development

- _____ Design of effective proposals
- _____ Closing sales through consulting proposals
- _____ Gaining and responding to RFPs and RFQ
- _____ _____
- _____ _____

Secure Early Wins and Build Credibility as a Consultant

- _____ Review strategies to gain early credibility as a consultant
- _____ Systems to ensure expertise is used
- _____ Develop strategies to gain significant credibility in first 90 days
- _____ _____
- _____ _____

Sharpen and Refine Leadership Skills

- Deepen grasp of leadership principles for the next level of executive responsibility
- Refine leadership skills needed to impact the culture and direction of the company
- Assess leadership abilities and influence; develop an action plan for improvement
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Positively Impact Morale Early in Tenure

- Impact employee morale & motivation
- Gain greater ability to improve employee morale and motivation
- Encourage team work and cohesiveness with staff, and throughout organization
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Managing Resistance

- Understanding resistance
- Determining underlying concerns
- Strategies for overcoming client resistance
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Requests for Information

- Getting the data needed from the client
- Steps in collecting data
- Designing a data collection interview
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Using Associates and/or Other Clients

- _____ Third-party consulting
- _____ Taking a whole-system approach
- _____ Putting whole-system discovery to work
- _____
- _____

Contracting with the Client

- _____ Contracting skills
- _____ Elements of a contract
- _____ Ground rules for contracting
- _____
- _____

Negotiating Contracts

- _____ Dealing with mixed agendas
- _____ Negotiation best practices
- _____ Overcoming obstacles to successful negotiations
- _____
- _____

Internal Consulting

- _____ Understanding the differences between internal and external consultants
- _____ Political positioning for internal consultants
- _____ The role of an internal consultant
- _____
- _____

Delivering Client Feedback

- _____ Do's and don'ts of providing client feedback
- _____ Overview of the feedback meeting
- _____ Managing confrontation during a feedback meeting
- _____
- _____

Positively Impact Morale Early in Engagement

- _____ Impact employee morale & motivation
- _____ Gain greater ability to improve employee morale and motivation
- _____ Encourage team work and cohesiveness with staff, and throughout organization
- _____ _____
- _____ _____
- _____ _____

Managing the Feedback Meeting

- _____ How to present data
- _____ Structuring the feedback meeting
- _____ Resistance in the feedback meeting
- _____ Conducting a group feedback meeting
- _____ _____
- _____ _____