Productize: Internal Service Outline

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I offer leadership coach to Director of information technology at B2B SAAS company in san francisco, CA
"How to lead my large technology team (10 members of more) and still maintain a personal touch with each person"

Early Quick Win: Develop a strategic communication plan to help the client easily stay in touch with team members, boosting morale and maintaining personal connections.
Final Success Metric: The client's team members will report a decrease in monthly complaints.

Internal Service Outline for Leadership Lessons Inc

MILESTONE SUMMARY

Milestone 1: Initial Evaluation and Baseline Establishment

- Action Item 1: Conduct an initial interview with the client to understand his current communication strategies and pain points.
- Action Item 2: Collect the history of complaints recorded in the past few months to establish a baseline for measuring improvement.

Milestone 2: Identify Personal Communication Preferences

- Action Item 1: Assess the communication preferences and styles of each team member through surveys or informal discussions.
- Action Item 2: Integrate the findings into a personalized communication plan, ensuring each communication style is respected and utilized.

Milestone 3: Develop the Strategic Communication Plan

- Action Item 1: Develop a communication plan catered specifically to the client's team, factoring in personal communication preferences.
- Action Item 2: Incorporate appropriate digital tools, regular update schedules, and feedback loops into the strategy.

Milestone 4: Implement the Communication Plan

- Action Item 1: Facilitate a meeting between the client and his team to explain and roll out the new communication plan.
- Action Item 2: Encourage the client to use the newly adopted communication methods for regular updates, important notifications, and to provide personalized feedback to each team member.

Milestone 5: Monitor the Introduced Communication Strategy

- Action Item 1: Regularly review the client's progress and team response to the new communication strategy.
- Action Item 2: Offer ongoing support to the client, answering any questions or addressing concerns that may arise during the implementation.

Milestone 6: Review and Adjust

- Action Item 1: Collect feedback from the client and all team members on the effectiveness of the new communication strategy.
- Action Item 2: Make necessary adjustments based on feedback and observed results to optimize the communication strategy.

Milestone 7: Recap and Measure Success

- Action Item 1: Compare the current number of reported complaints with the baseline established in Milestone 1 to measure success.
- Action Item 2: Review the overall improvement in team communication and morale with the client, reflecting on the client's journey and discussing any potential areas for further improvement.

ADDITIONAL RESOURCES

Additional document(s) - click here
Specific bonus(es) - click here

HOW TO ACCESS COACHING CALLS

Instructions: Please use this link access our calls - link to the conference room

Service Checklist for Leadership Lessons Inc

What is YOUR process to ONBOARD new clients?
Onboarding prepares you AND your client for the great work ahead.
- As you refine your ONBOARDING, use this checklist:

☐ A: Do you know who must attend the meeting? Make sure all important stakeholders are present
(paying client, point of contact, decision makers, influencers)
Bronze = person who paid attends the onboard meeting

☐ B: Do you know what information you need to begin work? Get ALL of the critical items now!
(pre-work, passwords, current process/tools/data/people, etc)
Bronze = understand the current "broken" process

☐ C: Do you know what you are listening for? Prepare to hear the worries and concerns of your client.
1 // Hear the goals, dreams, and desires of all stakeholders
2 // Document the risks watchouts, or trouble spots expressed by any stakeholder
3 // Clarify the need for a revised path or additional action items
Bronze: Ask the client "What is your preferred outcome from our work together?"

What is YOUR unique process of DELIVERY?
Delivery ensures all of the work is done on-time AND on-target
-Choose a QUICK WIN
-Choose a quantifiable METRIC

☐ Choose a QUICK WIN to create in the first 7 days
(Quick wins address the excitement / anxiety of clients who need to see “results” quickly.)

Bronze: Choose at least one, measurable quick win.

☐ Guarantee a quantifiable METRIC to measure success in the first 30 days
(Clear metrics help the client track their progress - and appreciate the journey)

Bronze: Choose at least one, quantifiable metric.

How will YOU appropriately RECAP the project?
Recap acknowledges the momentum and success created during the work with the client.
-As you refine your RECAP, use this checklist:

☐ A: Do you know who must attend this meeting? Make sure all critical stakeholders are in attendance
(paying client, point of contact, decision makers, influencers)
Bronze: person who paid attends the recap meeting

☐ B: Do you know what critical information you must return to the client? Give back everything you borrowed.
(pre-work, passwords, current process/tools/data/people, etc).
Bronze: any proprietary information about their current process

☐ C: Do you know what you are listening for? Prepare to hear from an excited client!
1 // Review the work and celebrate the goals achieved
2 // Recap the risks, watchouts, and trouble spots avoided
3 // Get clarity on their NEXT problem and what the next 90 days should look like (for both of you)

Bronze: Ask the client, "Did we meet your preferred outcome?"

What are the SPECIAL INGREDIENTS of YOUR service?
-Choose one of each below

Choose one of each

☐ The PRICE you charge clients:
☐ The GUIDANCE/SUPPORT you choose to offer:
☐ The EASY ELEMENTS you choose to include:
☐ The GUARANTEE that comes with your service”:

Service Outline: Special Ingredients

	Bronze	Silver	Gold
Price	$500	$5,000	$50,000
Guidance / Support	Owner	Review/feedback systems Vault of frequently asked questions (FAQs)	Senior or Junior person Trained team of coaches Community Group/Forum
“Easy” Elements	Attend our organized meetings	Experience our done-for-you services Follow our step-by-step templates	Use our simple software
Guarantee	Solve the PROBLEM or we keep working until its solved	Solve the PROBLEM or don’t pay until its solved	Solve the PROBLEM or your money back

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WHAT NOW?

If this is your first time receiving this report, you should
a) Decide if you are going create a new report OR move forward in the process
b) Post in our community group "What stood out to your most about your report?"
c) Ask a question, if necessary.

Remember, you get points for your posts!