

Business Excellence and Coaching

# BUSINESS DEVELOPMENT COACHING



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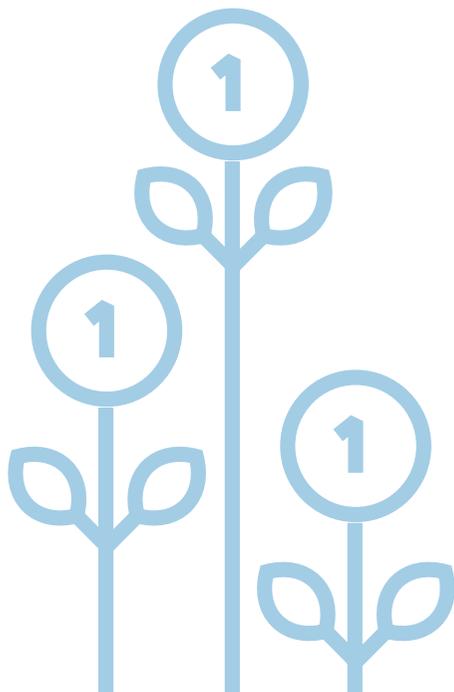
# WHAT IS THE PURPOSE OF BUSINESS DEVELOPMENT COACHING?

The purpose of Business Development (BD) coaching is to enable the development of a sustainable practice – with a good pipeline of work, an engaged team and work that is personally sustainable and satisfying.

BD coaching is tailored to the individual and may include:

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- pursuing and winning work
- clarity about value proposition
- developing a plan
- strategies and skills for building strong relationships
- identifying client opportunities
- building an effective team to assist with BD and to deliver for clients
- supporting people to build confidence and reduce stress.



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We do our best work when exploring with you what seems out of reach but would be a fantastic and meaningful outcome and working with you over time to achieve it.

## Who would benefit?

Anyone from the most senior and experienced rainmaker wanting advice to a senior professional wanting to build their skills and confidence in having business development conversations. Coaching is not remedial. Often the best performers have coaches.

## What is the role of the coach?

The role of the coach is to listen, ask questions and share views that will contribute to the success of the client. It is to both encourage and challenge, in a way that builds positive momentum and amplifies strengths as well as developing new habits, skills and perspectives. The role of the coach can be different for different clients, so it is important to get clear on this up front. Some clients want a coach to hold them to account and provide focus, others are more focused on skill development, and some seek clarity, advice and perspectives on how to build their practice.

## What is your role?

Having a coach is not a passive activity. The more you put in, the more you get out.

- It helps to be open with your coach about the things that challenge you the most.
- Be prepared to consider challenging questions.
- You will need to undertake actions between sessions.
- Giving feedback to the coach about what is working and what isn't working helps the coach make it work for you.

## How is the CEO, practice leader or business development manager involved in the coaching?

The CEO, practice leader or business development manager can play an important role in the success of the coaching engagement. While those roles operate differently in each firm, it is important that those people are aware of what you want to achieve. We recommend that the CEO or practice leader has some input into the objectives of the coaching and plays a supportive role throughout the engagement.

## How does it work?

There is an initial meeting to discuss your practice and what success is for you. Over the next couple of sessions we map out your current practice, including clients, areas of practice, fees and specific client opportunities to pursue. A key part of these earlier sessions is identifying the skills you do well and replicating them elsewhere, as well as identifying new habits/skills to build. Once we have clear objectives, we usually recommend a sponsor meeting – a conversation with the CEO, practice leader or BD Manager so that there is a shared understanding of the objectives.

Once there is a plan in place, we meet periodically to discuss how the plan is being implemented and to reflect on what is working well, and what is challenging, so that your thinking from your previous actions are accurate and helpful. We also discuss upcoming client meetings or how to progress opportunities. There may also be check in calls in between sessions to help keep the momentum or for you to discuss and prepare for conversations in real time.

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## What is Open Road's coaching methodology?

Our methodology is based on these principles when working with clients:

Working with you to uncover and clarify a compelling offering that is aligned to client needs, your firm's strategy and your strengths

That anyone can do BD. BD skills are developed over time through practice and accurate reflection

Your success is directly related to how effectively you engage in conversations and build relationships with existing and potential clients and with your colleagues/team

We help you to identify emotions, thinking or attitudes that may be impeding your success and work with you to make constructive shifts

Our work draws from a range of disciplines and starts with the premise that a professional's success is determined in a large way by the quality of work, conversations and relationships that a professional has with his or her clients, stakeholders and team – to generate work, coordinate work, build relationships and facilitate learning. We provide you tools and skills that help you to be effective and confident in the conversations with your clients and your team that will be required for you to be successful.

Moods and emotions are always impacting the quality of conversations, actions and decisions and we provide tools and practices that help build emotional intelligence and to skillfully navigate moods, so that you are being the best version of you most often.

We also place importance on you being connected to and informed of changes in the market and economy to ensure that you are well placed for future business opportunities and are mitigating risks.

## How do you know coaching has been successful?

The ultimate test of success is achieving the objectives established at the start of the engagement. This typically includes generating work, becoming more skilled and confident in business development conversations and building stronger client relationships. In many situations our clients see increases in workflow. In other situations with longer sales cycles the work generation benefits of coaching are realised after the engagement has concluded.

## What is the time commitment?

The time period of coaching is very much dependent on the nature of the engagement. Experience tells us that real progress can be made over a 6 month period.

## Session cancellation policy

We understand our clients will need to change times occasionally. We aim to be as helpful as we can, but for sessions that are postponed or cancelled within 24 hours, a 50% fee will be applied.

## Are the conversations confidential?

Yes. The coach has an obligation to you to not reveal any confidential details about our conversations, unless permission is provided by you. Your manager/sponsor needs to know and have input into the goals of the coaching, and we often involve them in a conversation with you present to get clear on this. We will communicate with you and your manager/sponsor if we don't believe that the coaching is working for you.