

# Coaching Session Report

## Session Overview

This session focused on reviewing progress against the current 90-day plan and defining priorities for the next phase of growth.

The discussion centred on sales execution, operational capacity, strategic partnerships, and the role of tender-based work. A key outcome of the session was the identification of a critical inflection point within the business: the shift from generating opportunities to effectively managing, retaining, and maximising them.

Particular attention was given to the performance and health of existing strategic partners, and how delivery capacity is beginning to influence partner behaviour and future pipeline stability.

## Key Discussion Themes

### Strategic Partner-Led Growth

The strategic partner model has been successfully implemented and is now the primary driver of new business. Relationships with key partner organisations are generating consistent, high-quality opportunities and have created a repeatable lead engine.

Regular engagement with partners is maintaining visibility and momentum, with recent activity resulting in multiple credible opportunities entering the pipeline.

### Strategic Partner Health and Retention Risk

While partner acquisition has been successful, early signs indicate that some partners may be exploring alternative providers due to constraints in delivery capacity and responsiveness.

This represents a shift in the business:

- The risk is no longer lack of opportunity
- The risk is erosion of partner confidence

The business is moving from a phase of **relationship creation** to one of **relationship protection and optimisation**, requiring a more structured approach to managing partner accounts.

## **Capacity Constraints and Operational Pressure**

Recent hiring has improved throughput and reduced some operational burden. However, increased demand has quickly absorbed this additional capacity.

Senior leadership remains involved in operational delivery and oversight, limiting time available for sales and strategic activity.

The business is currently constrained by its ability to deliver, rather than its ability to generate demand.

## **Sales Time vs Operational Time**

There is a clear gap between planned and actual time spent on sales activity.

Despite intentions to allocate significant time to sales, current capacity allows for considerably less. This has resulted in:

- Delays in follow-ups
- Reduced consistency in pipeline progression
- Limited proactive sales activity

There is clear evidence that increased time spent on sales directly correlates with increased revenue.

## **Tender Work as a Strategic Channel**

Tender opportunities, particularly within large institutional or public-sector organisations, were discussed.

While tenders limit direct sales interaction and often require competitive pricing, they provide:

- Strong credibility
- Access to larger organisations
- Entry into repeatable and funded work streams

These projects represent strategic assets that can be leveraged beyond immediate financial value.

## **Margin vs Repeatability Trade-Off**

A more nuanced approach to margin is emerging.

There is recognition that slightly reduced margins can be justified where they:

- Unlock repeat business
- Provide long-term pipeline visibility
- Strengthen positioning within key sectors

This supports a more stable and predictable revenue model.

## Pipeline Visibility and Lead Tracking

Lead flow is strong and consistent, primarily driven by strategic partners and supplemented by inbound enquiries.

However, there is limited formal tracking of:

- Lead sources
- Conversion rates
- Pipeline performance

While not yet a critical issue, this represents a clear limitation on optimisation and scalability

## Insights and Observations

- The strategic partner model is now the core growth engine and has been validated
- The business has reached a transition point where growth is constrained by **capacity and execution**, not demand
- Early warning signs indicate potential weakening of partner relationships due to delivery constraints
- The model is shifting from sales-led growth to requiring structured account management
- Sales activity remains the primary lever for growth but is constrained by operational demands
- High-value projects are strengthening credibility and unlocking future opportunities
- Revenue is being lost due to inconsistent follow-up and limited sales time

## Coaching Guidance

- Sales activity should be treated as a protected, non-negotiable component of the weekly schedule
- Improvements in time allocation should be incremental and sustainable

A structured **Strategic Partner Health Assessment** should be introduced, evaluating:

- Engagement frequency and quality
- Volume and quality of opportunities
- Conversion rates
- Delivery performance and responsiveness

This enables identification of:

- High-value partners to deepen relationships with
- Partners at risk of disengagement
- Opportunities to increase partner output

The business should transition to a formal account management approach, introducing:

- Regular partner reviews
- Structured communication

- Proactive engagement

Additional recommendations:

- Approach tender opportunities selectively, aligned to long-term strategy
- Leverage high-value projects for case studies and market positioning
- Introduce simple KPI tracking (lead volume, conversion rates, sources)

## Progress or Developments Since Previous Session

- Additional operational capacity has been introduced, improving throughput
- The strategic partner model has been successfully implemented
- New partner relationships are generating consistent opportunities
- A major institutional project has been secured, strengthening credibility
- Recurring revenue streams continue to develop
- A structured partner pipeline has been created

## Actions and Next Steps

Action	Purpose
Refine weekly calendar to increase protected sales time	Improve pipeline generation and conversion
Allocate dedicated time for pipeline management (follow-ups, quotes, closing)	Increase conversion and reduce missed opportunities
Conduct a health assessment of all current strategic partners	Identify risk, opportunity, and engagement levels
Categorise partners (high value, at risk, growth potential)	Enable focused account management
Introduce structured account management rhythm	Strengthen retention and increase partner output
Align delivery capacity planning with partner demand	Maintain partner confidence and service levels
Introduce simple monthly lead tracking	Improve visibility and decision-making
Prioritise high-value, strategic tenders only	Align effort with long-term growth
Develop major project into a case study	Strengthen credibility and support future sales
Capture content during project delivery	Support marketing and visibility

Plan additional operational support hire	Free up senior time for sales activity
Continue structured development of strategic partners	Strengthen primary lead generation channel

## Critical Strategic Insight

The business has reached a transition point where growth is no longer constrained by demand, but by delivery capacity and partner management capability.

### Why this matters:

- Strong demand and partner activity are already in place
- Without sufficient delivery capacity and structured account management, partner confidence will decline
- This creates a direct risk to pipeline stability and future revenue

### Primary constraint:

- Limited delivery capacity combined with lack of structured partner management

### What it impacts:

- Partner retention
- Revenue consistency
- Pipeline conversion
- Ability to scale

### Required shift:

- Introduce structured partner account management
- Align delivery capacity with partner demand
- Protect and maximise existing partner relationships