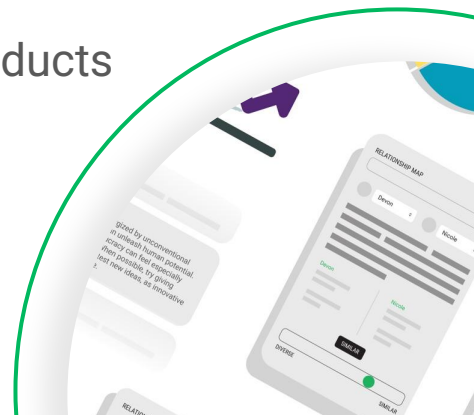


Beyond the Debrief

How to Turn Assessments Into Scalable Coaching Products



Agenda

- The current assessment dilemma
- Designing scalable coaching/training assessment products: a framework for behavior change
- Case Study: Program Design
- Pricing & Positioning for Value
- Our little secret: You do NOT have to be an assessment EXPERT! (Cloverleaf Sneak Peak!)
- Case Study: From Assessment Workshop to Ongoing Revenue
- Sharing your ideas and questions

POLL:
Tell us about You!

According to a 2024 ATD survey, only 18% of organizations say they fully leverage assessment data after the initial debrief.

(Yes, even if that debrief is done by YOU, the external practitioner!)

The Core Dilemma

Assessments don't
create change.
Behavior does.

- **Forbes, 2024:** 80% of HR leaders say their biggest challenge post-workshop is sustaining momentum.
- **Gartner, 2023:** Employees are 3.5x more likely to demonstrate new skills when learning is embedded into their daily workflow, compared to when learning is delivered in isolated events.
- **ATD Research:** Only 1 in 5 L&D initiatives lead to sustained performance change when follow-up mechanisms are absent.



My DISC Dilemma

My Spreadsheet & I...

- Memorizing DISC Types of the participants in a leadership program
- Having them put their DISC Types on their desks, office doors
- Putting together mixed DISC breakout groups, having to regularly re-presence work styles, communication styles



Designing a Scalable Coaching/Training Product

3-Part Framework: *Educate* → *Embed* → *Evolve*

1. **Educate** - Use assessments to establish a shared language for teams, managers, or clients. This sets a foundation for ongoing work—whether in communication, leadership, or conflict resolution.
2. **Embed** - Ongoing, bite-sized coaching (nudges, reminders, tips) delivered in the flow of work keeps insights alive, and behavior changing.
3. **Evolve** - Use assessment data as a guide to tailor interventions over time: team coaching, leadership development sprints, culture initiatives, etc.

Case Study: Transforming Teams with Coaching Skills & Assessment Nudges

Program Snapshot:

- 200+ Leaders in Hospitality Organization | 2 Years | 5 Cohorts of 40-50
- 6-Month Coaching Skills Training
- Assessment Nudges for Leaders + Their Teams → Real-time coaching insights

Leader's Evolution

Practice: Learned & practiced coaching skills while using Assessment Nudges to tailor conversations to team needs (DISC, 16 Types, Enneagram, VIA Strengths, Energy Ryhtym, Culture Pulse, Motivating Values)

Reported Results of Assessment Nudges Use During Program:

- Greater confidence in navigating conflict
- Tackled tough conversations they previously avoided
- Empowered and listened to teams more effectively
- Built deeper trust and stronger team dynamics

Pricing & Positioning For Ongoing Values

Shift the Conversation:

- **From:** “Here’s a 90-minute session/workshop.”
- **To:** “Here’s 90 days of embedded growth.”



Values Based Pricing Insights

Price for transformation, not just time.

- *Offer tiers:*
 - *Self-guided content + assessment insights*
 - *Group coaching or team-based development*
 - *Layer in 1:1 as a premium option*
 - *Position yourself as a long-term development partner, not a transactional vendor.*



**THE GREAT NEWS?
WITH CLOVERLEAF YOU DO NOT NEED
TO BE AN ASSESSMENT EXPERT!**

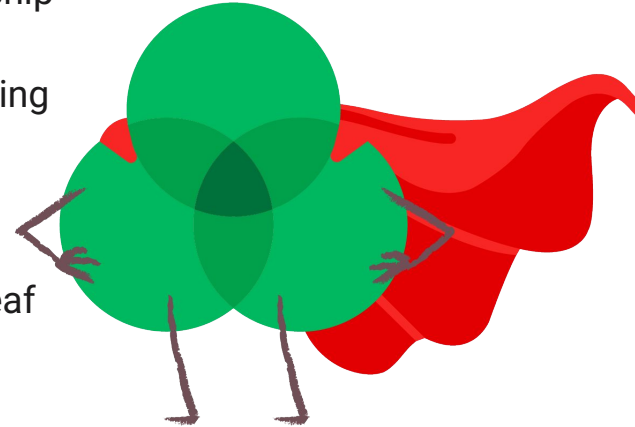
Addressing Our Fears

- *“Will this feel robotic?”*
 - *Use assessment data to personalize support—not generalize it.*
- *“Am I just automating my value?”*
 - *Let technology reinforce, not replace, the relational work.*
- *No, “big bad technology” will never replace the human interaction of coaching, training & the art of human connection (no matter what Bill Gates says!)*



From Workshop to Ongoing Revenue: A Real-World Cloverleaf Use Case

- Delivered a DISC workshop for a local Chamber of Commerce leadership program (25 local business leaders)
- Gave all participants 6 months of Cloverleaf access to reinforce learning
- Followed up with a monthly leadership newsletter and two virtual webinars
- Expanded into additional assessments like Enneagram and 16 Types
- Trained participants to add and coach their own teams using Cloverleaf
- Positioned as the go-to development partner across Chamber organizations
- Results
 - a. Signed keynote speaking contract
 - b. Contracted with Chamber Leadership team for Cloverleaf Use
 - c. Proposal out for a multi-session leadership training series
 - d. Built long-term pipeline through referral and embedded value



**What ideas has this
conversation sparked about
YOUR practice?**

What questions do you have?

