



The Courageous Entrepreneurial Leap-Start Program
Module Three

Tara Butler Floch
wwwBroadviewCoaching.com

BROADVIEW
COACHING



WHAT WE ARE COVERING TODAY

3rd Module

- Understanding who Center of Influences are
- Understanding the Value of Center of Influence Interviews
- How to Set up and Conduct Center of Influence (Market Research) Interviews
- Review COI interview “template” and how to customize
- Tracking your data

WHO ARE CENTERS OF INFLUENCE (COIs)?

- They are the "movers and shakers" in your niche *and/or* They are divine ideal clients for you *or were at one time*.
- They understand the unique needs/challenges/pains of the community/niche you are exploring or choosing.
- They know other COIs and key people in your niche, such as other professionals with whom you may be able to create Strategic Alliance or Partnership relationships.
- They know the venues where you could do your signature talk and/or know where you may be able to publish an article.
- They are willing to share all the above information with you.

WHY INTERVIEW COIs?



1. Be able to explore a niche(s) and decide whether it is or is not a fit for you
2. Build credibility and knowledge about your Divine Ideal Clients and their community/niche *even if you already think you know them well*
3. Build a relationship channel /network within your target niche
4. Hone in your offer and message. Use “client speak” in your messaging! Plus COIs are your litmus test!
5. Get specific about who is the bullseye, who is the dartboard, and who is off your board

WHY WOULD THEY SAY “YES”?!?



What's in it for them?



HOW DO I FIND COIS?

- **Start with the network you already have. Who do I know that is a COI OR would know some great COIs?**
- **Do keyword searches on LinkedIn and then identify who you already know or those who know people who are potential COIs**
- **Send out a request on Social Media (Facebook, Twitter, LinkedIn)**
- **Think of where these folks commune and contact the heads or organizers of those organizations**

STAGES OF THE COI INTERVIEWS

Stage One – Exploration

Exploring Possible Niches to get clear on the Niche you will choose

Goal – to choose one niche and put a stake in the ground!



Stage Two – Clarity & Depth

Getting Clarity on the Niche You've Chosen and their biggest challenges/pains/desires

Goal – to find your “sweet spot” and start building out your relationship channel



Stage Three - Creating a Credibility Marketing Channel

Continued interviews to build content for Credibility Marketing and Expanding/Deepen the Relationship Channel

Goal – Build depth of content and relationships

STAGE ONE - EXPLORATION



- Choose 1-3 niches to explore
- Do the “Price is Right” exercise
- Set up at least 3 interviews with COIs in that niche
 - Divine Ideal Clients/Prospects
 - People who were once your Divine Ideal Client but have already made the transformation you want to help others with
 - Other professionals that work with your Divine Ideal Clients
 - Other influencers in that niche (especially connectors!)
- Spend 30 minutes ask them about their biggest challenges, pain points, obstacles and desires
- See where you are “leaning in” and “leaning out”
- Meet with as many COIs as you need to get clear on which niche “stake” you want to put in the ground



STAGE TWO MAY BE YOUR STAGE ONE

- Some of you will go right to Stage Two because you are already clear on the niche you want to work with
- The initial interviews in Stage Two are similar to Stage One
 - Ask them about their biggest challenges, pain points, obstacles and desires
 - See where you are “leaning in” and “leaning out”
- Later on, you will have more interviews in your niche that ask deeper questions about the areas where you notice both you and your COIs are leaning in.

HOW DO I GET A COI INTERVIEW?

- Make a list of who you already know who are movers/shakers/former clients AND anyone you know who knows them!
- Prioritize the list to the top 3 to start with and email or call them!
- If it's someone you don't already know or know well, ask for a warm introduction from someone you know well to make the connection

REACHING OUT TO SOMEONE YOU KNOW

“Hello, it’s [insert your name]. I could really benefit from your help and insight. I really want to gain a deeper understanding of the challenges that [insert your niche] faces and what I could do to better serve them so I am conducting research interviews with people like you who (are in; work with; are familiar with) the niche with whom I’m working (or with whom I am exploring working). I would love to take you to coffee (or have “virtual coffee” by phone) and spend 30 minutes (or longer) with you to ask you some questions. This would be a huge benefit to me in 1) serving (this niche) more effectively. (Conversely you could say in exploring whether (this niche) could benefit from my skills/talents)). I plan on meeting with at least 10 other people like yourself and I am happy to share with you a summary of my findings when I’m done”

REACHING OUT TO FOR A CONNECTION

“Hello, it’s [insert your name]. I would really appreciate your help. I really want to gain a deeper understanding of the challenges that [insert your niche here]faces and what I could do to better serve them so I am conducting research interviews with people who (are in; work with; are familiar with) the niche with whom I’m working (or with whom I am exploring working). I know you may not personally be someone to interview but I know you know some people in this niche that would be great to connect to. Would you be willing to make a warm introduction to (either specific people or simply say) people you know that would be helpful for me to meet with? I would love to set up a coffee meeting (or have “virtual coffee” by phone) and spend 30 minutes with them to ask you some questions. This would be a huge benefit to me in 1) serving (this niche) more effectively. and I am happy to share a summary of my findings with them when I’m done”

REACH OUT AS A “COLD CALL”

“Hello, my name is _____ and I am a (insert Title) here in (your town/region). I would really benefit from your help and insight. I really want to gain a deeper understanding of the challenges that (my niche) faces and what I could do to better serve them so I am conducting research interviews with people like you who (are in; work with; are familiar with) the niche with whom I’m working (or with whom I am exploring working). I would love to take you to coffee (or have “virtual coffee” by phone) and spend 30 minutes with you to ask you some questions. This would be a huge benefit to me in 1) serving (this niche) more effectively. (Conversely you could say in exploring whether (this niche) could benefit from my skills/talents)). I plan on meeting with at least 10 other people like yourself and I am happy to share with you a summary of my findings when I’m done”

DEVELOPING YOUR INTERVIEW GUIDE



- **Customize it based on your specific niche**
 - Specificity brings depth
- **In the Exploratory Stage, focus on the challenges/obstacles/desires**
 - Marketing questions aren't needed until Stage Two
- **Always end with the following:**
 - *Are there any other people like you, with a deep knowledge of (this community), who you know that I should contact that could help address some of the questions I have about (this community)? Would you be willing to make a warm introduction to me by email?*
 - *What questions should I have asked that I didn't?*

COI MEETING



- Set these up for 30 minutes or longer, depending on your niche.
- Lay out your objective for the meeting and your agenda
- Ask the questions. Only talk 20% of the time!
- Keep the focus! If they want to talk about being a client, set up a separate time to talk
- If you are approaching 30 minutes (or whatever amount you promised it would be), ask them if they have a hard stop. If they do, wrap up. If they don't and you think it would be useful to continue, ask for a specific amount of additional time.
- Wrap up the meeting by thanking them, asking if you can follow up with them with additional questions and to review your summary of findings with them
- Send thank-you. Handwritten note is a plus!

THE KEY - FINDING YOUR NICHE SWEET SPOT



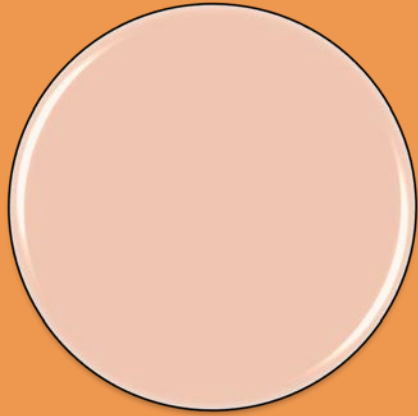
STAGE TWO – CLARITY & DEPTH

- Continue your COI interviews
 - Do at least 10 total within your chosen niche
- Look for where you are both “leaning in” and start to hone in on your “Sweet Spot”
 - Start to think about other solutions to help with challenges/obstacles/desires that are outside your sweet spot
 - Resources
 - Other Professionals
 - Possible Strategic Alliances
 - Start to think of ways to help your clients solve their biggest challenges, overcome their biggest obstacles and step into what they deeply desire
 - Tools, Resources, Exercises
 - Ways I may support them

TRACK WHAT YOUR HEARING

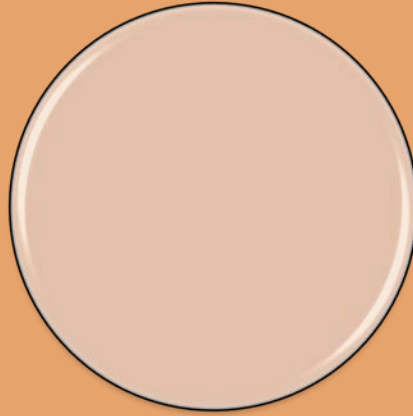
- Keep a spreadsheet that has each COI and the major highlights from each interview.
 - Start this after the first interview
- Color code themes you are hearing (choose one color for each major theme or bucket and change the font color for each theme)
- Highlight in yellow on the challenges/obstacles/desires you are most excited about
- Highlight in Red the themes you are hearing that you are **not** excited about
- Rate each COI by level of importance
 - “A” was both helpful with information and connects you to others
 - “B” was either helpful OR a good connector
 - “C” is neither that helpful or connects you

IT'S A SPECTRUM



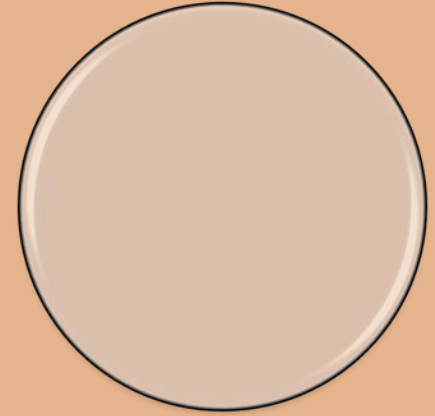
Pure Coaching

Ex: Co-Active
Coaching or Life
Coaching



“Coachsulting”

Hybrid of Coaching
and
Training/Consulting



Training/Consulting

Step by Step
Regimented Program



HOMWORK

1. **Customize your Interview Guide**
2. **Set up at least 3 COI interviews (at least one per niche) for the Exploratory Stage**
3. **Have at least 1 COI before module four**
4. **Once you've chosen a niche, do at least 10 COIs in that niche.**
5. **Track your COI interviews on the COI spreadsheet. Highlight themes. Rank COIs**