

## WORKING WITH RICH POOLE, CO-PILOT® – WHY WE MIGHT BE A GOOD FIT



I pride myself on the value that I deliver and the progress that the business owners that I'm fortunate to work alongside, experience. Importantly, it's about having rapport, the ability to listen, asking the right questions, interpreting responses and providing outcomes for you that make you feel motivated, successful and happy.

The purpose of this document is to ensure 1) that there is alignment with you and your business, 2) a win-win relationship and 3) that we don't waste each other's time.

If I'm not the right fit for you, I'll happily provide suggestions from within my network if you wish. Thank you.

### Common Outcomes Delivered

- ✓ **More clarity** - More 'aha' moments with what you're doing, why & where you're going.
- ✓ **More confidence** - We all doubt ourselves, but we shouldn't.
- ✓ **More progress** - A sense of action, momentum & satisfaction, not simply more planning.
- ✓ **More decisiveness** - Plan but actually take the step and Do it!
- ✓ **More time** - Taking your nights and weekends back to be with yourself, friends or family.
- ✓ **Better sleep** - Due to feeling in control and making progress.
- ✓ **More money** - Cashflow, Profitability and increased potential exit value.
- ✓ **More energy & fun!** - More motivation, more confidence, more balance, less anxiety & stress.

### Why consider working alongside Rich?

- ✓ **An ability to listen, genuine empathy, honesty & a track record**  
I've been fortunate to have had some 'success' as a business owner, creating, managing and selling to the 67<sup>th</sup> largest company on the Fortune 500 company. I've lived the business roller coaster, including experiencing starting into the abyss asking, 'What am I doing?', celebrating the wins and then everything in between! My objective is to save you from some of those typical dips in the journey, by listening to you, being kind & treating you as an equal, to get you closer to where you'd like to be.
- ✓ **Perspective**  
My daily life revolves around Gratitude, Health & Wellbeing, Family Time, Friend Connections, then the Work stuff – however recognising that although most of us would prefer for our work not to be central to daily life, the reality is that we all need money to survive, provide and indeed experience a good life.
- ✓ **A specialist generalist**  
I'm not suggesting that I'm an expert in any one thing, however I've experienced many things first hand in business and as a result can assist with most industries & functional areas of business, e.g. purpose, strategy, tactics, HR, finance, sales, growing databases into communities, marketing, research, IP, IT, digital and really, a lot more, however we can talk about that.
- ✓ **Value for money**  
I'm a listener, interpreter, lateral thinker, doer and networker with 25 years of business experience including with global brands, our ~100 year old family business and two private businesses. When we work together you get all of that experience packed into each hour spent with you or on your business.

### Why should you consider help?

- ✓ **You're seeking Clarity, a Plan & wish to make Progress i.e. Get stuff done!**  
*Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.* Sun Tzu. Progress is the biggest tick you can get when running a business. I'm confident that I can help you achieve clarity, a workable plan and the progress that you're seeking.

Thank you. For more details, please see the [Co-Pilot website](#), [LinkedIn](#) profile and [Testimonials](#).



### ✓ You're seeking Accountability

I'm not looking to be your boss. I'm looking to be your Business Co-Pilot. Your Wingman if you like. We all need a helping hand and even the thought of someone asking you 'So, the last time we spoke you were going to do 'x'. How are you progressing with that and let's work out where to from here?'

### Process from here

- 1) **An initial 10 minute no-obligation phone call and/or email**
- 2) **Complete Questionnaire** - to help me to help you faster and further determine a fit.
- 3) **Free no-obligation 20 minute online Zoom/Skype meeting**
- 4) **If the Decision is to proceed based on the suggested cost, then a proposal will be drafted for you.** (If accepted, as I'm an NZTE Regional Business Partner, we can consider whether applying for an NZTE Capability Voucher is relevant, for up to 50% or a maximum of \$5000 + GST)
- 5) **Once signed off, Mini-DD (Due Diligence)** to ensure that the Discovery session is maximised
- 6) **Discovery meeting/workshop/presentation/Skype**, where 2-3 Actions are agreed there and then, before a broader plan is developed for you
- 7) **Usually, a great relationship** where significant value is added to the business and your life.

### Value & Rates

Type of work	Rate (excluding GST) as at 1st March 2020
Hourly	\$350 (\$175 after NZTE/ATEED RBP voucher, if applicable)
Half-day	\$1295
Half-day – Groups of up to 10	\$4000

### Terms

<b>Travel time</b>	Dependent on the location, time of day and length of engagement.
<b>Expenses</b>	e.g. Flights. Oncharged at cost.
<b>Payment terms</b>	Depending on the engagement, there may be an upfront invoice/payment required. Otherwise invoiced monthly or at the conclusion. Payment within 7 days.

<b>Minimum engagement</b>	For non-project related engagements (e.g. ongoing strategy and coaching work), a minimum three hours per month.
<b>Termination</b>	One meeting's notice by either party. We have an honest conversation, shake hands, wish each other all the best, and continue to help each other wherever possible.
<b>Agenda</b>	Effective and efficient meetings start with great agendas.
<b>Note taking</b>	Great businesses capture all ideas. This can either be done by the client or myself.
<b>Task mgt software</b>	I tend to use Trello with some Google Docs for overall task management.
<b>Hours charged</b>	Great coaches/advisors do great prep before meetings, great followup after meetings, and always dedicate some mental real-estate for dreaming up ideas for clients 24/7. Generally, every hour of meeting time requires ~one hour of support time to maximise the value. If you want someone that rocks up to meetings with no prep, no follow up and switches off the moment that the meeting ends, then I'm not the right person for you.
<b>Time recording</b>	A breakdown is always available to be sent to you.

For any other questions, please don't hesitate to ask. I operate in a very honest, transparent and ethical way & have nothing to hide. I'm confident that I can add genuine value to any business, open to change.

Thank you. For more details, please see the [Co-Pilot website](#), [LinkedIn](#) profile and [Testimonials](#).