

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



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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 13th largest company on the US Fortune 500. 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 25 minute no-obligation phone call, Zoom or email discussion**
- 2) **If the Decision is to proceed based on the suggested outcomes & 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)
- 3) **Once agreed & signed off, we progress to Mini-DD (Due Diligence)** to ensure that the Discovery session is maximised
- 4) **Discovery meeting/workshop/presentation/Zoom**, to clarify any questions.
- 5) **Creation of an online Action Plan**
- 6) **Further follow up** and a decision around future meetings and accountability.
- 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 Individual workshop	\$1250
Half-day Group workshop (up to 10 businesses)	\$1000 per business (up to two attendees per business), on or offline.

Terms

Travel time	The preference is to meet at the office or online. Any travel time is charged at standard hourly rates.
Expenses	e.g. Flights. Oncharged at cost.
Payment terms	Depending on the engagement, there may be an upfront invoice/payment required. Otherwise invoiced monthly or at the conclusion of our time. Payment within 7 days.
Minimum engagement	For non-project related engagements (e.g. ongoing strategy and coaching work), a minimum three hours per month.
Termination	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.
Agenda	Effective and efficient meetings start with great agendas.
Note taking	Great businesses capture all ideas. I will always take notes, however please note that time is charged if you require these notes drafted for you.
Task mgt software	I tend to use Trello for overall task management.
Hours charged	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.
Time recording	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](#).