

The goal of working with a professional storyteller is three-fold:

- Create an environment of trust within the team (3 new members) and with other groups at [Company]
- Build a knowledge base of what makes a good story while transferring storytelling skills to the team
- Give participants a practical, real-world experience using story in a business setting

This Work Plan describes how [Consultant] will help [Client] meet this goal, what the specific deliverables are, assumptions, timeframe, costs and payment plan. [Client] agrees to provide supporting data as needed. Provided that the working relationship as described in this Work Plan is satisfactory to [Client] and [Consultant] and that all of [Consultant]'s businesses abide by all governing laws and regulations, [Client] is willing to give a professional reference to [Consultant]'s prospective clients, and to allow [Consultant] to list [Company] as a client. Once the goals are met with these sessions, [Consultant] agrees to destroy all notes and records, whether in paper or electronic format. [Client] has given [Consultant] permission to use the experiences of their work relationship in future stories as long as [Client]'s identity, the identity of the team as a whole, and the identity of her individual team members is protected. This Work Plan is the final agreement between [Client] and [Consultant] for this portion of their work together.

# Approach

## Overview

The Operations & Finance team needs to convey the on-going financial story to stakeholders internal to [Company], and give them clear directives for increasing profit margins. [Consultant], Storyteller, intends to give the team the foundational skill set they need to use storytelling skills to do this successfully.

## Project Methodology

A collaborative approach is pl[Client]d for all phases of our work together:

- **Phase One: 1-on-1 Interviews**
- **Phase Two: Team Workshop**
- **Phase Three: Presentation Coaching**

### Phase One: 1-on-1 Interviews

Initially, there will be a series of one-on-one interview sessions held individually with each team member. It is expected that these interviews will be conducted on site at the [Company] Headquarters in Beaverton.

**The purpose of this phase is to allow the workshop facilitator to better understand the participant's needs, refining and tailoring the workshop experience, and to build a bond of trust between the participant and the facilitator.**

These interviews will be followed (within a short turnaround time, estimated at less than a week) with a workshop designed for the entire team.

### Phase Two: Team Workshop

The workshop will also be conducted on location at [Company] Headquarters and will be a day-long interactive session with the entire Operations & Finance team. The emphasis of this workshop will be on story crafting and presentation skills. It will also provide learning experiences that allow participants to build self-confidence and hone their abilities to gain trust and establish better rapport with people outside of Operations & Finance team.

Principles of storytelling will be explored using real-world terminology and situations that have been provided by [Client] and by the team members during the 1-on-1 interviews.

**The goal of this workshop is to transfer knowledge on how to construct a good story so participants have the confidence to effectively communicate financial data and evoke responses from their listeners that allow them to make changes to move toward greater profitability.**

### **Phase Three: Presentation Coaching**

Following the workshop, each member of the team will receive individualized coaching on a specific presentation.

**This phase is designed to give participants an opportunity to apply the knowledge acquired during the workshop, while building self-confidence and giving team members the skills to gain the trust and build the rapport needed with people outside of Operations & Finance.**

This follow-up phase may include from one to three individual one-hour sessions held either individually or in small groups of less than three team members. These sessions may be held in person, over the telephone, or via GoToMeeting.