

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.