Change Management & Coaching System

Cortado Group

Rewire the frontlines. Embed behavior change. **Deliver revenue outcomes.**

Executive Snapshot

The Problem | Revenue plans fail in execution. Reps fall back to old habits, managers do not coach, training fades. Assumptions on conversion, cycle time, and attainment collapse, and leadership revises forecasts instead of reinforcing behaviors.

Our Solution | Install a high-accountability coaching system. Define "what great looks like" by stage, train managers first, then reinforce with reps through live call coaching, skills drills, and weekly inspection.

Your Impact | Sales becomes predictable. Ramp times shrink. Managers coach to outcomes. Forecasts improve because motions and messaging are consistently reinforced. PEGs see traction that matches the thesis.

Aligning to the PortCo Lifecycle

Every PortCo goes through predictable stages. Light touch early; the center of the hold is where behaviors are installed and performance becomes repeatable.

CHANGE & COACHING SYSTEM	Surface cultural/ behavioral blockers	Shorten Valley of Chaos for early initiatives	Lock in new behaviors across GTM	Institutionalize best practices	Sustain adoption through exit
	Day 0	0-12 Month	Year 1-3	Year 3-5	Year 5+
PHASE	**Commercial Diligence**	**Early Investment**	**Investment**	**Growth**	**Exit**
TRIGGER	Does the market story hold up?	We need proof the growth plan is working.	We're off-plan and need to fix execution.	We need to scale without breaking	We need a clean, defendable GTM story for buyers.
STAGE EMPHASIS	Market validation, Early GTM fit check, Board confidence pre-close	Early traction, Board alignment, Operating proof	Pipeline rebuild, Operating rhythm reset, Mid-hold GTM realignment	Infrastructure to scale, Comp/territory redesign, Margin defense	Defensible GTM story, Predictable revenue engine, Buyer confidence

Low — High
Need & Level of Effort

Why This Matters Now

These aren't just training gaps, they're breakpoints in your operating model:

- **The revenue plan is built, but behaviors aren't mapped or measured**
- **Coaching is inconsistent, optional, or left to instinct**
- **Manager 1:1s don't reinforce the motions that drive pipeline or velocity**
- **Rep activity increases, but conversion and ASP remain flat**
- **Performance varies wildly by rep, region, or product**
- **CRM tells you what happened, not why**

Every missed number traces back to missed behavior.
Change management and coaching are how you close that gap,before it erodes growth or investor confidence.

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Our Solution

What We Do

1 Codify the Sales Motion

- Map buyer journey and friction points
- Align sales skills to funnel conversion metrics
- Define messaging, inflection points, and rep actions tied to plan assumptions

2 Train the Managers

- Coach frontline leaders on how to lead change
- Certify them in call observation, deal inspection, and coaching feedback
- Install coaching cadences that reinforce revenue-driving behavior

3 Reinforce with Reps

- Run live call reviews, roleplays, and deal progression drills
- Tie rep actions to stage-specific conversion expectations
- Monitor adoption through skill assessments and call data

4 Embed and Scale

- Bake coaching into weekly manager 1:1s and team reviews
- Connect rep behavior to forecast inputs and stage movement
- Build dashboards for behavioral lift and plan tracking

How We Deliver

ACTIVATION

Align PEG, CRO, and enablement leaders on GTM assumptions in the revenue plan.

Identify behavioral gaps that block conversion, velocity, or ASP goals. Baseline current-state coaching rhythms.

TRACTION

Train managers and begin call coaching. Roll out coaching playbooks and rep skill frameworks.

Monitor progress against key funnel assumptions (e.g., discovery-to-demo rate, proposal-to-close rate).

ENABLEMENT

Operationalize a coaching loop that directly supports forecast attainment.

Equip managers to diagnose gaps in rep behavior, not just opportunity health. Build dashboards that tie plan assumptions to observed skills.

BEHAVIOR CHANGE EMBEDDED

Case Study / Proof Point

Company/Segment PE-backed medical education company

Challenge Selling was siloed and inconsistent. Clinical experts lacked buyer persona fluency and confidence to lead discovery, competitive win rates lagged, and there was no coaching cadence to scale.

What We Did Cortado replaced siloed selling with a unified coaching model that elevated clinical experts into confident revenue producers.

Results

+48%	improvement in buyer persona fluency
+29%	increase in confidence to lead conversations
+9%	win rate lift in competitive head-to-head deals

Clear coaching rhythm installed across 6 verticals

Revenue plan re-baselined to reflect new pipeline confidence