



# Engagement Decision Tree

## Which level of advisory services do you need?

I offer advisory/fractional services at two levels: **Execution Advisory** and **Fractional Operations**. Use this decision tree to determine which services best suit your needs. For each step choose A or B and follow the recommended next step or service listed for your response. For example, if in Step 1 you choose A, you then “Go to Step 2”. However, if in Step 1 you choose, B, Coaching is probably the next step for you.

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## STEP 1: What Is the Core Problem?

### A. Execution is breaking down

- Decisions stall or reverse
- Leadership behavior creates friction
- Accountability is inconsistent
- Priorities are unclear or competing

→ Go to **Step 2**

### B. Someone wants personal growth, feedback, or skill-building

- Individual confidence or communication
- Career development
- Emotional processing

→ Please visit my [Coaching](#) page

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## STEP 2: Where Does the Problem Live?

### A. Across the leadership team or organization

- Patterns repeat across leaders
- Behavior inconsistency impacts performance
- The issue shows up systemically

→ Go to **Step 3**

### B. With one leader, role, or function

- A specific leader is creating disruption
- One role lacks clarity or capability



→ **Execution Advisory**

(Uses frameworks, standards, and plans rather than coaching alone)

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## STEP 3: What Level of Involvement Is Required?

### A. The organization needs standards, clarity, and plans

- Define leadership behaviors and expectations
- Assess gaps using validated frameworks
- Design improvement plans tied to outcomes

→ **Execution Advisory**

### B. The organization needs help executing those decisions

- Decisions are made but not implemented
- Ownership and follow-through are unclear
- The CEO is still the bottleneck

→ Go to **Step 4**

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## STEP 4: Is Embedded Support Required?

### A. Yes — execution needs stabilization

- Role clarity is missing
- Operating rhythm is weak
- Leadership team alignment is unstable

→ **Fractional Operations**

(Time-bound, execution-centered, non-industry specific)

### B. No — leadership can execute with guidance

→ **Execution Advisory**

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## QUICK CHECK

**“Is this work about improving organizational performance — or supporting an individual?”**

- Organizational performance → Advisory or Fractional
  - Individual support → **Coaching**
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## STILL UNSURE OR HAVE OTHER QUESTIONS?

Schedule a brief **discovery call** to explore fit. These conversations are straightforward and informational. If my work aligns with what you need, we'll discuss next steps. If it doesn't, I'll tell you that as well.