

Selling and Delivering the Entrepleio Team Behaviours Index

A practical sales and resource pack for consultants — from the first client conversation to measurement, exploration and targeted intervention.



Spend More Time with Clients. Spend Less Time Building from Scratch.

Team development engagements often require consultants to create diagnostics, administer surveys, interpret results, identify development priorities and design workshops before meaningful client delivery can begin. The Entrepleio Team Behaviours Index provides a connected measurement and intervention system that consultants can use within their own client relationships and delivery approach.

Focused Measurement

A structured team behaviour measurement with clear areas for exploration and relevant intervention recommendations.

Ready-to-Use Resources

Workshop resources, structured team reports and campaign administration and reporting support – all prepared for you.

Scalable Commercial Model

A flexible approach that grows from a focused pilot to enterprise-wide adoption, matched to client readiness and ambition.

- ❑ You retain the trusted client relationship and professional judgement. TBI gives you the measurement, insight and resources to strengthen your work.

One Connected Journey from Interest to Impact

The consultant sales and delivery journey follows five clear stages, each with prepared resources, examples and practical guidance. This consistent structure gives consultants a repeatable, confident route from initial client interest through to measurable team impact.



At every stage, consultants have access to prepared resources, examples and practical guidance to support the client conversation and build momentum towards delivery.

STAGE 1

Start with the Client's Team Challenge, Not the Product

Relevant Situations

- A leadership team that wants to improve its effectiveness
- A team navigating significant change or transformation
- A team with larger than expected or desired staff turnover
- A newly formed or restructured team
- A team experiencing unclear accountability or inconsistent collaboration
- A group moving from good performance to higher performance
- An organisation seeking a repeatable approach across multiple teams
- An organisation wanting to identify the underpinning strengths leading to a teams consistent high performance and wishing to share that learning across the whole organisation

Consultant Approach

01

Identify a relevant team or organisational challenge

02

Introduce the idea of calibrating team behaviour

03

Explain the connection between insight, exploration and intervention

04

Share the appropriate introduction

05

Offer a short discovery or demonstration conversation

- ❏ Lead with relevance and curiosity. Avoid sending an unexplained product pitch.

Simple Ways to Open the Conversation

Email Example

Subject: A practical way to improve how teams work together

Hi [Name], I wanted to share an approach that may be relevant to the work you are doing with [team, programme or business area]. The Entrepleio Team Behaviours Index helps teams calibrate the behaviours influencing their performance, explore what the results mean and identify the interventions most likely to make a practical difference.

Unlike diagnostics that finish with a report, TBI connects behavioural insight directly to a bank of ready-to-use team interventions. A focused pilot with one or two teams can be a practical way to experience the approach and assess its wider relevance. I have attached a short introduction. If it looks useful, I would be happy to show you an example report and talk through how it could work in your context.

Best wishes, [Consultant name]

LinkedIn Message Example

Hi [Name], I thought this might be relevant to your work with [team or organisation]. I am using the Entrepleio Team Behaviours Index to help teams calibrate how they work together, explore the behaviours influencing performance and select practical interventions matched to their needs.

It may be useful where teams are navigating change, strengthening leadership alignment or looking to improve collaboration and accountability. Happy to share a short overview or show you how a focused pilot works if it would be helpful.

Resource Links

-  [Consultants: Unlock Higher Team Performance Introduction](#)
-  [Alternative email and LinkedIn templates](#)

STAGE 2

Make the Complete Journey Tangible

The purpose of the demonstration is not to explain every feature. It is to help the client feel and understand the experience, and see how TBI moves from measurement to practical action. TBI does not make decisions for the team – it creates a structured basis for exploration and empowers the team and consultant to decide what will be most valuable.

1 Measure

The team completes the TBI measurement

2 Calibrate

The report calibrates the team across the TBI behavioural framework

3 Explore & Prioritise

The consultant facilitates exploration of the results; the team identifies strengths and priority areas

4 Develop

Relevant interventions are selected; the consultant delivers chosen workshops, and follow-up activity reinforces the change

A Focused Demonstration, Not a Product Tour

Demonstration Agenda

01

Reconfirm the client context – what is happening in the team and why does it matter?

02

Introduce the TBI approach – measure, calibrate, explore and intervene

03

Show a sample team report – illustrate the type of behavioural insight available

04

Explore one example finding – show how the consultant supports a team in making sense of it

05

Show a matched intervention – demonstrate the connection between insight and practical action

06

Discuss a potential pilot – identify one or two teams where the approach could create value

Helpful Discovery Questions

- Which teams are most important to current performance?
- Where are team behaviours enabling or constraining progress?
- What development activity has already been attempted?
- What would a meaningful improvement look like?
- Which team could provide a credible and useful pilot?

Resources

- 🔗 [Sample TBI reports](#)
- 🔗 [Example workshop intervention](#)
- 🔗 [TBI demonstration guide](#)
- 🔗 [Client discovery questions](#)

STAGE 3

Give the Client Confidence in the Approach and Its Delivery

After a demonstration, clients may need further evidence or practical information before progressing. The client should understand both the value of the approach and what will happen in practice. Consultants can support the client's decision by providing relevant evidence, clarity on roles and answers to common questions.

Evidence and Examples

Case studies showing how TBI has been applied, examples of the client experience, and sample outputs and intervention resources.

Administration Clarity

An overview of how campaigns and measurements are administered, and clarity on the respective roles of Entrepleio, the consultant and the client.

Practical Assurance

Information on confidentiality, participant communications and reporting, plus answers to common client questions.

Resources

- 🔖 [TBI case studies](#)
- 🔖 [Distribution Centre overview](#)
- 🔖 [Frequently asked questions](#)
- 🔖 [TBI Campaign Overview](#)
- 🔖 [Consultant and client responsibilities](#)

Clear Roles. Consistent Delivery. Consultant-Led Value.

Entrepleio provides the infrastructure and resources. The consultant brings context, judgement, facilitation and trusted client leadership. Understanding this three-way model gives clients confidence in how the engagement will be managed and delivered.

Entrepleio	Consultant	Client
- Provides the TBI measurement and intervention framework - Provides the campaign and report administration platform - Maintains the reporting and intervention resource resources - Provides supporting guidance and materials	- Owns the client relationship - Identifies the client need and shapes the engagement - Administers team measurement and reporting - Facilitates report exploration - Uses professional judgement to select interventions - Delivers workshops and follow-up activity	- Selects the participating teams - Confirms purpose and intended outcomes - Supports participant engagement - Takes part in exploration and intervention - Owns the resulting commitments and actions

Start Proportionately. Create a Route to Scale.

The proposal should reflect the client's need, readiness and ambition. It should not force the client into a large commitment before value has been demonstrated. Three commercial pathways allow consultants to match the approach to where the client is.

Pilot	Scaling Solution	Enterprise Solution
Purpose: Experience TBI, demonstrate value and learn within a controlled scope. Typically, one or two priority teams. Proposal emphasis: clear business need, defined scope, agreed outcomes, measurement, reporting, exploration, selected intervention and review.	Purpose: Extend a successful approach across a wider group of teams – a business area, leadership population, transformation programme or selected team portfolio. Proposal emphasis: common objectives, consistent delivery, prioritisation of teams, consolidated learning and phased rollout.	Purpose: Embed a repeatable team performance approach across the organisation – multiple business areas, regions or team populations. Proposal emphasis: governance, scalable administration, consistent standards with local flexibility, portfolio-level insight and ongoing measurement.

Pilot with purpose. Scale with evidence. Embed with confidence.

Translate the Client Need into a Clear, Credible Offer

Proposal Checklist

Client Context

- What is the business or team challenge?
- Why is action needed now?
- Which teams should be included?
- What would success look like?

Scope

- Number of teams and participants
- TBI measurements and team reports
- Exploration sessions and interventions
- Follow-up, reinforcement and optional consultant support

Commercials

- Entrepleio measurement and reporting costs
- Consultant preparation, delivery and workshop costs
- Travel or venue costs where applicable
- Scaling assumptions and client-specific terms

Decision

- Recommended starting point and proposed timetable
- Client and consultant responsibilities
- Decision required and immediate next step

Proposal Resources

 [Consultant pricing calculator](#)

 [Pilot proposal template](#)

STAGE 5

Turn Agreement into a Confident Client Start

Once the client agrees to proceed, maintain momentum through a clear onboarding process. Each step moves the engagement from commercial agreement into structured, confident delivery.



From Campaign Set-Up to Team Intervention



Phase 1: Prepare

Confirm purpose and scope. Set up the client campaign. Agree participant communications and confirm the delivery schedule.



Phase 2: Measure

Launch the TBI measurement. Monitor participation, provide appropriate reminders and generate the team report.



Phase 3: Explore

Review the report. Prepare the exploration session. Help the team interpret the results and agree strengths and priority areas.



Phase 4: Intervene and Reinforce

Select the most relevant intervention. Deliver the workshop. Agree practical actions and reinforce learning and review progress.

Resources

- Client campaign setup instructions [available for Entrepleio Customers and Partners]
- Using the TBI report and running exploration sessions [available for Entrepleio Customers and Partners]

Everything You Need at Each Stage

The resource library is organised around the five sales and delivery stages. Use resources selectively – the aim is to support the client decision, not overwhelm the client with material.

Stage	Consultant Objective	Core Resources	Client-Facing Resources
Raise Awareness	Create interest around a relevant client need	Awareness email and LinkedIn templates	Organisation introduction; Consultant introduction
Demonstrate	Show how TBI moves from measurement to intervention	Demonstration guide; Discovery questions	Sample reports; Example interventions
Support	Build confidence and answer practical questions	FAQ; Roles and responsibilities	Case studies; Distribution Centre overview
Propose	Present a proportionate and commercially clear approach	Pricing calculator; Scoping checklist	Pilot, scaling and enterprise proposal templates
Close and Onboard	Move efficiently into delivery	Campaign, measurement, reporting and delivery instructions	Participant communications; Delivery pathway

Keep the Conversation Relevant, Practical and Proportionate

- Start with the client's context, not a generic product description. Use questions to understand the team challenge.
- Show the link between behavioural insight and practical intervention. Position TBI as enabling exploration, not judging the team.
- Avoid overwhelming the client with reports, features or resources. Recommend a pilot where it creates a credible route to learning.
- Be clear about responsibilities, costs and expectations. Use evidence from the pilot to shape wider adoption.
- Preserve consultant judgement and client ownership throughout. Agree a specific next step at every stage.

TBI works best when it is introduced as a practical route to better team conversations, better choices and better performance.

A Simple Consultant Checklist

Use this checklist before any client meeting to ensure you are prepared at every stage of the sales and delivery journey.

Awareness

- ☐ Have I connected TBI to a relevant client need?
- ☐ Am I using the most appropriate introduction?
- ☐ Have I proposed a clear next conversation?

Demonstration

- ☐ Do I understand the client's context?
- ☐ Have I selected the most relevant sample report?
- ☐ Can I show the connection to an intervention?

Support

- ☐ What evidence or information does the client need?
- ☐ Have I made roles and delivery practicalities clear?
- ☐ Am I answering questions without overloading the client?

Proposal

- ☐ Is the scope proportionate?
- ☐ Are the intended outcomes clear?
- ☐ Have I included the full delivery effort?
- ☐ Is there a clear route from pilot to scale?

Onboarding

- ☐ Are the scope and responsibilities agreed?
- ☐ Are campaigns, communications and dates confirmed?
- ☐ Is the exploration and intervention pathway clear?
- ☐ Have follow-up and reinforcement been included?

Identify One Relevant Client. Start One Useful Conversation.

Think about your current clients and contacts. Where is team performance critical to success? Which teams are navigating change, pressure or growth? Where would greater behavioural understanding improve collaboration or accountability? Which client would value a practical pilot, or benefit from seeing a sample report and intervention?

1	2	3
Select one relevant client or team	Tailor the awareness message	Share the appropriate introduction
4	5	5
Arrange a discovery and demonstration conversation	Use the pricing calculator to shape a pilot	Propose a pilot

Entrepleio gives you a structured route from team insight to practical action. You bring the relationship, judgement and delivery expertise.

Need Support

[\[EMAIL\]](#) [\[BOOK A SUPPORT CALL\]](#)

Resource Library

[TBI Consultant Resources](#)