



Kelly Mallery Coaching & Consulting LLC

Coaching Investment Justification Tool

A PRACTICAL, CONFIDENCE-BOOSTING RESOURCE
TO HELP WOMEN IN CI ROLES MAKE A STRONG
BUSINESS CASE FOR COACHING

Real Business Goal or Project

Before beginning a request from your leader for coaching support, it is important that you can connect the need with a tangible outcome or project you are currently working on.

What current **business goals, projects, or initiatives** are you currently working on or will be working on soon?

Presented by Kelly Mallery

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Business Case Builder

Now you want to connect the value coaching will bring you to the business needs and challenges. Use the below checklists to help you in your thinking.

What **business challenges** are you currently facing?

Check all that apply

- ☐ Poor implementation of improvement initiatives
- ☐ Low trust from leadership on CI/Improvement
- ☐ Many project delays caused by resistance or misalignment
- ☐ Low cross-functional collaboration
- ☐ Slow decision-making and problem-solving
- ☐ Low employee engagement and ownership
- ☐ Lots of rework / firefighting caused by unclear communication
- ☐ Weak pipeline of future leaders
- ☐ Other: _____

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Now you want to connect the value coaching will bring you to the business needs and challenges. Use the below checklists to help you in your thinking.

What is currently slowing down or inhibiting your **personal impact**?

Check all that apply

- ☐ Resistance delaying CI initiatives
- ☐ Difficulty influencing senior leaders
- ☐ Being pulled into firefighting instead of strategic work
- ☐ Feeling unheard or undervalued as a CI expert
- ☐ Struggling to engage operators/supervisors
- ☐ Needing stronger executive presence
- ☐ Lower confidence in high-stakes conversations
- ☐ Other: _____

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Now you want to connect the value coaching will bring you to the business needs and challenges. Use the below checklists to help you in your thinking.

What are the **skills you need** to improve to overcome both the business challenges and the things slowing down your personal impact?

Check all that apply

- ☐ Navigating resistance without causing burnout
- ☐ Increasing credibility and influence across the org
- ☐ Communicating with clarity and authority
- ☐ Managing up effectively
- ☐ Leading with and spreading a scientific mindset
- ☐ Facilitating alignment across levels
- ☐ Building psychological safety and trust
- ☐ Staying calm and effective under stress and pressure
- ☐ Other: _____

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Email Request Template

Pulling all of the items you selected and reflected on over the last 3 sections into a warm and direct request for coaching that touches on real business challenges and connects the benefit you and the organization will gain from you getting this development.

Hi *[Manager]*,

I'd like to request support for a 1:1 coaching engagement that will strengthen my ability to lead continuous improvement and support the goals of our organization.

My role requires *[insert 2-3 skills needed from the checklist]*. Coaching will help me develop the skills to deliver results more effectively and sustainably—specifically in the areas of *[insert 2–3 business outcomes from the checklist]*.

The coaching program includes weekly sessions, practical tools for managing change and resistance, and direct support for the initiatives I'm leading. I believe this will significantly increase my impact and help our team achieve *[insert business goal, initiative or project]*.

I'm happy to discuss details or provide additional information.
Thank you for considering this,
[Name]

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In Perso Request Guide

If instead you are going to make the request in person, here is a guide for the conversation you can use.

“I want to strengthen my ability to lead change and deliver results with less resistance and more momentum. Coaching would help me improve *[specific business outcome]*, and I’m confident the investment would pay off quickly. Can I walk you through how this supports our current priorities?”

My role requires:

[insert 2-3 skills needed from the checklist].

Coaching will help me develop the skills to deliver results more effectively and sustainably—specifically in the areas of:

[insert 2–3 business outcomes from the checklist].

The coaching program includes:

- weekly sessions
- practical tools for managing change and resistance
- direct support for the initiatives I’m leading.

I believe this will significantly increase my impact and help our team achieve:

[insert business goal, initiative or project].

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Objection Handling Guide

Objections and questions from your leader are going to happen. So prepare for them!

Objection: “We don’t have the budget.”

Response:

“Understood. My goal is to reduce friction and rework in the initiatives I’m leading. Coaching will help me accelerate results and avoid delays — so the investment will likely pay for itself quickly.”

Objection: “We already have training.”

Response:

“Training teaches knowledge. Coaching builds daily habits and application. It helps me implement what I’ve learned and use it on real challenges.”

Objection: “Now isn’t a good time.”

Response:

“This is exactly when it’s needed most — we’re driving major changes, and I want to lead them effectively.”

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