

Virtual Coach Accelerator

The Inner Game of Coaching

Learning & Using The BANT Model

BANT

- Developed by IBM in the 1960s:
- IBM created the BANT model as part of its sales methodology during the 1960s. The company needed a systematic approach to qualify leads efficiently and ensure that their sales teams were focusing on the most promising opportunities.
- The success of BANT in the corporate sales environment made it a widely adopted model across various industries, including coaching, where it's used to assess the readiness and potential of coaching clients.
- Although it's a framework was originally developed for sales teams to help them efficiently qualify leads, BANT allows businesses to identify which prospects are most likely to become paying customers, ensuring that time and resources are invested wisely.

BANT Model

- BANT stands for Budget, Authority, Need, and Timeline.
- The primary purpose of using the BANT model in coaching is to ensure that coaches are working with clients who are ready to engage in the coaching process.
- BANT - helps coaches identify potential clients who are interested in coaching/doing business AND are also ready and able to commit to the coaching/learning process.
(This ensures that coaches spend their time with clients who are most likely to benefit from and invest in their services, as well as those that are most likely to see results.)
- BANT stands for:
 - Budget: Does the potential client have the financial resources to invest in coaching?
 - Authority: Is the person you're speaking with authorized to make a decision?
 - Need: Does the potential client have a need that coaching can fulfill?
 - Timeline: Is there a specific timeframe within which the client needs a solution?

BUDGET

Understanding the financial capability of a potential client.

It is not just about do they have the finances it is also about are they willing to invest and are they able to invest it? Does the potential client have the financial resources to invest in coaching?

Example:

Scenario: A coach identifies a small business owner who is struggling with leadership challenges.

Budget Question: "Have you set aside any budget for personal or leadership development this year?"

Analysis: If the client has a budget, they are more likely to invest in your coaching program if it falls within certain range.

NOTE- Your program does not have to align or fall inside of their budget, which is why it is good to have a tiered approach to your offerings so that you can suggest one that does

Budget Example

Apple's Reluctance to Invest in AI Early (2010s)

In the early 2010s, Apple prioritized hardware over AI, while Google, Amazon, and Microsoft heavily invested in AI-driven assistants. Google Assistant and Alexa quickly outperformed Siri, as Apple underfunded AI research, assuming Siri was sufficient.

By the time Apple recognized AI's importance, competitors had taken the lead. Now, Apple is playing catch-up in generative AI.

Apple's Missed Budget Need:

- Apple had the financial capability but didn't allocate enough budget to AI development early on, assuming their existing Siri assistant was "good enough."
- By the time they recognized the need, competitors had already captured a major portion of the market.
- Apple has since increased AI investment significantly but is now playing catch-up in generative AI, while competitors lead the industry.

Lesson for Coaches (BANT Connection - Budget)

- Just because a client has the money doesn't mean they see coaching as a priority.
- If a business (or client) doesn't invest early in the right areas, they may struggle later when their competitors or peers gain an edge.
- A coach must help clients see coaching as an investment in their future success, rather than an unnecessary expense.

AUTHORITY

Ensuring you are speaking with the decision-maker. Is the person you're speaking with authorized to make a decision?

Example:

Scenario: You're speaking to a corporate employee interested in you coming in to coach the team, the department or company as a whole but needs approval from their HR department.

Authority Question: "Are you the one who makes the final decision on hiring, or do you need to consult with someone else?"

Analysis: If they are not the decision-maker, find out who is and, if possible, engage them directly.

Many times the person you are speaking with is indeed the sole decision maker, however they can be influenced by others without knowing it, if speaking with someone who is married they may not think they need to consult with someone else but it is good to be aware in of and in some cases ask. [Virtual Coach](#)

AUTHORITY Example

Kodak's Internal Battles Over Digital Cameras

Kodak was the dominant photography company for decades, but it faced an internal battle when digital cameras emerged. Kodak invented the digital camera in 1975 but resisted innovation, fearing it would cannibalize their film business. Despite engineers seeing the shift, executives ignored the need, allowing Sony, Canon, and smartphones to dominate. By the time Kodak embraced digital, it was too late—they filed for bankruptcy in 2012.

Lesson for Coaches (BANT Connection - Authority)

- Sometimes, the person you're speaking to (a manager, employee, or team leader) isn't the real decision-maker.
- If decision-makers aren't on board, even the best ideas won't gain traction.
- As a coach, it's important to identify who has the actual authority to invest in coaching and ensure they understand its value.

NEED

Does the potential client have a need that coaching can fulfill? This assesses whether the client has a problem or pain that your program/offering can address.

Example:

Scenario: A coach encounters an entrepreneur who is feeling overwhelmed with work-life balance.

Need Question: "What challenges are you currently facing that you'd like to resolve?"

Analysis: If the client expresses a clear need, they are more likely to be receptive to your coaching solutions.

- Ensure you are listening for a 'need' versus a 'nice to have' this will help you in assessing whether they are in fact motivated to shift things and if they are/will be committed to the work.
- Connecting to the cost this is having on them helps highlight the NEED if necessary
- knowing their actual need also helps you better prescribe what pathway is best for them if you have multiple to offer.

NEED Example

Blockbuster vs. Netflix – The Missed Need for Digital Transformation

Blockbuster dominated video rentals in the 1990s but ignored shifting consumer preferences. Netflix launched in 1997 with a DVD-by-mail model, later introducing subscriptions and streaming (2007).

Blockbuster dismissed streaming as a minor trend and even rejected Netflix's \$50M buyout offer in 2000.

By the time they recognized the need for change, Netflix had already taken over, and Blockbuster's late streaming attempt failed. They filed for bankruptcy in 2010.

Lesson for Coaches (BANT Connection - "Need")

- . Clients, like companies, don't always recognize their needs until competition or external changes force them to.
- . Just as Blockbuster didn't initially see the need for streaming, many coaching clients may not recognize the deeper obstacles preventing them from succeeding until they experience a crisis or see a competitor thriving.
- . A coach's job is to help clients uncover and understand their needs proactively, before they become urgent.

TIME

Understanding the urgency of the client's need. Is there a specific timeframe within which the client needs a solution?

Example:

Scenario: A potential client wants to achieve specific goals before the end of the year.

Timeline Question: "When are you looking to start seeing results from coaching?"

Analysis: If the client has a clear timeline, it helps in structuring your coaching offer to meet their needs within that time frame.

knowing the timeline helps you assess whether your offer can meet their needs as well as if their timeline is feasible.

A timeline, or goal date is also a great motivator to ensure the potential client is committed to the result and helps you organize what you offer and how to be in line with that period.

TIME Example

Tesla and The Global EV race

Legacy carmakers like Ford, GM, and Toyota underestimated the rapid rise of EV demand, treating it as a long-term trend. Meanwhile, Tesla aggressively pushed ahead, launching the Model S (2012), Model 3 (2017), and Model Y (2020)—dominating the market.

By the time traditional automakers realized the urgency, Tesla had built a global supply chain, brand loyalty, and tech advantage. Now, they are scrambling to catch up, while Tesla continues to lead in battery, software, and self-driving innovation.

Lesson for Coaches (BANT Connection - Timeline)

- Clients may believe they have plenty of time to act, but external forces (market changes, personal challenges, competition) can accelerate the need for change.
- Coaches must help clients recognize the urgency of addressing their challenges today rather than waiting until it's too late.
- A client who delays coaching might later find themselves struggling to catch up.

Virtual Coach

Case Study- Sarah

The Corporate Executive

- Sarah is a 45-year-old senior executive at a large multinational corporation. She has been with the company for over 15 years and is currently in line for a potential promotion to the C-suite. However, she feels increasingly stressed and burnt out, struggling to balance her demanding job with her personal life. Sarah has been contemplating hiring an executive coach to help her navigate this challenging period.
- Details:
 - Sarah earns a substantial salary and receives a yearly bonus. However, she is unsure about how much she should allocate for personal development and is concerned about the return on investment.
 - While Sarah is the decision-maker for her personal expenses, her company offers reimbursement for executive coaching if it meets certain criteria. However, Sarah would need to get approval from her HR department.
 - Sarah is experiencing significant stress and burnout, which is affecting her performance at work. She believes that coaching could help her regain focus and prepare for the promotion.
 - Sarah's promotion process will begin in six months. She wants to ensure that she is mentally and emotionally prepared by then, so she's looking to start coaching immediately.

Case Study- Michael

The Small Business Owner

- Michael is a 38-year-old entrepreneur who owns a small but rapidly growing tech startup. He's passionate about his business but finds himself overwhelmed by the daily challenges of running a company. Michael has heard about the benefits of business coaching and is considering it to help him develop better leadership skills and improve his company's overall performance.
- Details:
 - Michael's business is profitable, but cash flow is tight due to recent investments in new technology and talent. He is cautious about spending money on services that don't have an immediate, measurable impact on his bottom line.
 - Michael is the sole owner of the company and has full authority to make financial decisions. However, he often consults with his CFO before making significant expenditures.
 - Michael recognizes that his leadership skills are crucial to the continued growth of his company. He wants to improve his decision-making and strategic planning abilities.
 - Michael is preparing for a major product launch in three months. He believes that improving his leadership skills before the launch could significantly impact its success, but he's concerned about the time commitment coaching might require.

Case Study- Karen

The Retired Professional

- Karen is a 62-year-old retired marketing executive who spent over 30 years in the corporate world. After retiring, Karen initially enjoyed her newfound free time but now feels restless and unfulfilled. She is considering starting a consulting business to keep herself engaged but is unsure how to begin. Karen is interested in working with a coach to help her navigate this new phase of life.

Details:

- Karen has a comfortable retirement fund and receives a pension. However, she is wary of dipping too much into her savings for what she perceives as non-essential services.
- Karen is fully in charge of her financial decisions, but she is conservative with her spending and prefers to get input from her financial advisor before making new investments.
- Karen is struggling with the transition from full-time work to retirement and feels a strong need to find purpose and direction. She believes coaching could help her clarify her goals and build a successful consulting practice.
- Karen wants to start her consulting business within the next six to nine months. She's not in a rush but wants to feel confident and prepared before she commits to this new venture.

Exercise

Applying the BANT Model

You'll work through three real-world case studies, each with its own challenges around Budget, Authority, Need, and Timeline.

Your Goal:

1. Re-Read each case carefully.
2. Identify which aspects of the BANT model are at play.
3. Use the guiding questions provided to dig deeper (Found on Google Doc)
4. Think about how you would approach the conversation without jumping straight to solutions.
5. If time permits go to the 'Deeper Questions' section on same google doc

Tips for Success:

- Look for clues in the details — sometimes the real obstacle isn't the obvious one.
- Consider how you'd frame your questions or reframe the client's perspective.
- Remember: This is about uncovering the right information to qualify the client, not closing the sale.