

# Start Consulting Checklist



A practical checklist to help you prepare a consulting business while keeping your risk, time, and energy under control.

## FREE CONSULTANT TEMPLATE

### Use this when:

You want to test consulting before quitting your job, validate an offer, or prepare your first client project.

### Outcome:

A clearer problem, simple offer, safer boundaries, first conversations, and a small operating system.

### 1. Problem and buyer

- Write one problem you have solved more than once.
- Define who has this problem and would pay to fix it.
- Describe a useful 30- to 60-day outcome.

### 2. Validate before branding

- Talk to real people before building a big website or brand.
- Ask how they describe the problem in their own words.
- Capture words you can reuse in your offer and sales calls.

### 3. Keep the first offer simple

- Choose a fixed-scope format: audit, sprint, strategy session, or setup.
- Match the offer to the hours you actually have each week.
- Make the deliverable, timeline, and outcome clear.

### 4. Protect your full-time job

- Check your contract for outside work, conflicts, IP, confidentiality, and non-compete rules.
- Use your own laptop, email, tools, data, and time.
- Avoid your employer's clients, competitors, or vendors unless approved.

### 5. Find clients through trust

- Start with former colleagues, managers, friends, and warm LinkedIn contacts.
- Ask for feedback and introductions without hard pitching.
- Share practical content that your target buyer would recognize.

### 6. Prepare pricing and boundaries

- Pick a fixed fee that feels professional and realistic.
- Explain the outcome, process, timeline, and fee in one simple structure.
- Define response times, meeting rhythm, scope, and extra work rules.

### 7. Build a tiny operating system

- Track contacted people, opportunities, projects, invoices, payments, and follow-ups.
- After every call, record the problem, language, objections, and next step.
- Keep the system simple enough that you will actually use it.

### 8. Turn projects into proof

- Capture what changed, improved, or became easier for the client.
- Ask for a testimonial while the value is still fresh.
- Do not quit too early; look for repeat demand, proof, savings, and a reliable client source.

### This week's next action

Write one problem, one buyer, one small offer, and five people you can contact for feedback or referrals.