



# The Entrepreneurial **CONSULTING CHECKLIST**

8 Steps To Quit Your Job  
& Become A Consultant

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***Were you among the millions of employees who, during the pandemic, enjoyed the freedom and flexibility that came with working from home?***

Perhaps you dreaded going back to the office — a decision over which you had little say.

During the pandemic, people around the world quit their jobs for these exact reasons.

Their pay was too low.

There were no opportunities for advancement.

They felt underappreciated at work.

Working from home gave them a taste of newfound freedom and flexibility — and they could never look back.

But some employees didn't have a choice.

They needed income from the only place they knew how to get it: their JOB.

And that meant working with whatever terms their company threw at them.

What if you could make your own rules?

What if you had a say in how you worked, where you worked, who you worked with — and how much you could earn?

What if you ran your own business — and were making yourself wealthy instead of your employer?

It may sound foreign. Even far out there.

But it doesn't have to. Every day more and more people are taking control of their lives. Their future. Their destiny.

They are monetizing and leveraging their existing skills, knowledge, and experience to become successful consultants.

And you, my friend, are likely a lot closer to making this happen than you might think.

I'm going to show you exactly how to get started.

***This guide is for those who are working 9-5 (or maybe it's more like 8am to 6, 7, or 8pm!) but want to use their current skills and passions to build a low-risk, high-reward entrepreneurial consulting business.***

The 8 steps I'm about to share with you are based on over 20 years of running consulting businesses and over a decade helping people transition out of their jobs and into building profitable, scalable, and strategic consulting businesses.

Before I give you the 8 steps, remember the motto: "Imperfect Action."

We'll come back to that often. Why?

Forget perfection. Prioritize progress. That's how you'll get ahead and gain traction.

You don't need more information. You need to implement. And that's what this guide will help you do.

Let's dive right in and get started.

## STEP 1

# Get Clear On Your "Why"

***"He who has a why can bear any how."***  
Victor Frankl

***What's the biggest factor which determines if you'll start and grow a successful consulting business?***

Your ability to take consistent, imperfect action.

It's challenging to be consistent — and take action — unless you are clear on your "why."

By "why," I mean your reason for transitioning out of your job to start and build a business.

Your job offers you perceived stability and structure. Those can be legitimate reasons for staying at your job.

You trade in freedom, flexibility, income, and potential for stability and structure.

For many people, this trade-off is worth it.

But if you're reading this guide, then you're looking for something more.

In our 2022 "How To Become A Consultant" study, we asked over 1000 people why they decided to become consultants.

Here's the breakdown of their responses:

- 38% of people became consultants to realize their potential.
- 28% of people became a consultant to be their own boss.
- 11% were most attracted to the unlimited income potential, and 11% desired a flexible schedule.
- 6% became a consultant because they were laid off from their job, and 4% wanted to work from anywhere.

What is your reason?

What is your why?

Do you want to double, triple, or increase your income by tenfold?



Do you want to be able to set your own schedule, have more freedom and flexibility, travel and work from anywhere in the world?

Do you feel like you were destined for something more — and that by starting your own consulting business, you'll realize your true potential?

Or perhaps it's a combination of all of these reasons.

Whatever it is, you must have a deep understanding of your why.

Your why will motivate you to take action, no matter how challenging that action is.



**A. Nicole Campbell**  
CEO of Build Up Advisory Group

### **How A. Nicole Campbell Uses Her “Why” To Do The Uncomfortable Work**

Here's an example of how getting clear on your why will help you take action.

In episode 176 of the Consulting Success® Podcast, A. Nicole Campbell, a non-profit/governance consultant, spoke about her why — and how it helped her move forward in her business.

Here's what I asked her...

I remember, Nic, back in one of our weekly clarity coaching calls, that you recognized the importance of marketing your business, doing follow-up, and prospecting. I remember at one point, you said you felt like you were getting a bit stuck. You needed to do it, but you weren't always getting it done.

I asked you, “Why are you doing what you're doing? What's driving you? Why'd you leave the corporate world and start this whole thing?” You said, “I did it for my kids, to be with them, to have greater flexibility.”

Do you remember that call and that conversation?  
Nicole went on to say:



*"I remember it clearly. It was one of the turning points for me, because when you said, You have to think about that - Immediately they came to mind like, "I'm doing this for my family. They are depending on me in that way.*

*It crystallized everything for me: there's the client work that you have to do, but there's also the building of the business.*

*There's the building of this lifestyle that you said that you wanted to create for you and your family.*

***Every time that you decide not to do the hard work that will help you grow your business, or you don't feel like working on your marketing, you're moving further away from that dream."***

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Read that last quote again.

Every time that you decide not to do the hard work that will help you grow your business, you're moving further away from that dream.

So, you can decide to not start that conversation, to not do that worksheet, to not invest in that program that will help take you to where you want to go...

...but if you make that decision — and inaction is a decision — then you are drifting away from your dream.

## **Action Step**

Getting clear on your why starts by defining your core values. Your core values are your principles about your vision, mission, and principles.

For example, here are the core values of Consulting Success®:

### **We Are La Familia:**

We're a family-owned business and we treat our team, clients, and community like one big family with respect, honesty, genuine care, and trust. We go the extra mile for our clients and team members. We truly want to help the people we come in contact with. We love to serve people beyond what is typically expected in a business relationship.

### **We Are Entrepreneurial:**

We believe growth and improvement make life and business exciting and challenging. We're always learning, growing, taking action, surrounding ourselves with smart, ambitious, and inspiring people. Reaching new levels of personal and business success is what we're all about!

### **We Believe Health is Wealth:**

We prioritize health. Mental health, daily physical exercise, and having a flexible schedule that allows us to recharge and create amazing life experiences inside and outside of work are key to how we operate and run our business.

### **We Are Worldwide!**

The people, the languages, the cultures, the food, and the geography, make this place we call earth, a truly spectacular and unique gift to us all. We celebrate this through travel, deep exploration, and by happily working with and supporting people of all backgrounds, religions, and ethnicities.

Everything we do must live up to our core values.

And personally, these core values are my "why."

Today, we have a healthy 7-figure business with great clients from around the world, a great team, strong systems in place, and a lifestyle we love.

For us, success isn't about flashy cars and private jets.



This is what success looks like to us:

- Having a growing business that we are excited to work on and are passionate about, a team we love working with, and clients that we think of as family and friends.
- Spending plenty of time with our family, loved ones, and friends.
- Being able to enjoy an amazing meal, gym class, or vacation whenever we want.
- Experiencing an overall feeling of wellbeing, comfort, and stability.
- Living life on our own terms with a very flexible schedule we feel in control of.

What does success look like to you?

And why are you committed to achieving that success?

Let's start taking action.

First, write down your personal values: words that define you. Write down as many that come to mind.

Here are a few great examples from James Clear.

- Inner Harmony
- Adventure
- Wealth
- Challenge
- Meaningful Work
- Recognition
- Success
- Balance
- Community
- Learning

Second, write down the values of your future clients: words that define the type of people you'd like to work with and serve. These can be the same as your own values. Write down as many that come to mind.

Third, select 3-5 of the most important words that you listed.

Finally, now that you've written your list of core values, flesh them out.

- Talk about what they mean to you.
- Talk about why they're important.
- Talk about what they'll do for you, your business, and your clients.

Don't worry about it sounding perfect.

Write something down and finish it. You can come back and edit later.

Remember: imperfect action.

This is the first step to becoming an entrepreneurial consultant.

Your core values will give you the resolve to undertake this journey — and the will to stick with it until you succeed.

## STEP 2

# Start Thinking Like An Entrepreneurial Consultant

### What is an entrepreneurial consultant?

An entrepreneurial consultant is both an entrepreneur and a consultant.

Let's break that down.

An **entrepreneur** owns and operates a business, attempts to make a profit, solves problems, and makes the most of opportunities.

A **consultant** provides expert advice professionally, works in a particular field or industry, diagnoses problems — and then recommends actions and solutions.

By combining the two, you run a business where you provide expert advice in a particular field or industry.

Clients have and will pay for your experience, expertise, and guidance.

As an entrepreneurial consultant, your product is your expertise.

You create products and services around your expertise that solve problems and create results for your clients.

Now, running your own consulting business is very different than being an employee.

As a consulting business owner, you don't have a boss who's giving you a steady paycheck.

Instead of a single employer, your income comes from a variety of clients who pay you for your consulting work.

The pressure is on you to not only do the work — but to also bring in the work as well.

To that end, one of the most critical things you must do is to adopt the mindset of a consulting business owner.

First, what do I mean by mindset?

Your mindset refers to the way you think about yourself and your business.

It's the internal dialogue you have with yourself.

As an entrepreneurial consultant, you'll learn how to take control of your mindset.

You'll direct and manage your internal dialogue instead of it directing and managing you.

For example, many new consultants deal with imposter syndrome.

They lack confidence when it comes to marketing and selling their expertise to clients.

But have you been able to create results and provide value for your employer?

If your answer is yes, then it's time to stop doubting yourself.

That's proof that you're competent. Add confidence to the mix, and you'll begin thinking (and acting) like an elite entrepreneurial consultant.

The right mindset here is to focus outwardly on the value you can create instead of inwardly on how you feel.

Your confidence should come from the value and results you create for your clients.

That's what matters most.



**Scott Payne**  
CEO at SDP Solutions, LLC

### **How Scott Payne Adopted The Elite Consulting Mind — & Won More Clients Than He Knew What To Do With**

Scott Payne is the CEO and founder of SDP Solutions. He helps mortgage companies manage their prospects and pipeline.

Before becoming a consultant, he spent 15 years in the corporate world working at a call center for one of the largest mortgage companies in the world.

He acquired deep expertise in the field and made a lot of valuable industry contacts.

Scott was considering going out on his own for a few years. He knew he had the expertise and the contacts to help clients develop effective outreach strategies.

His close friend who also worked as a consultant urged Scott to strike out on his own.

So, he decided to make the move.

Despite his vast experience and network, Scott struggled to adopt the entrepreneurial consultant mindset.

As an employee, he benefited from various departments that provided him with ideas, feedback, and support.

But as an independent consultant, he no longer had anyone to bounce his ideas off of.

He had to get used to being on his own.

After signing up for our program, we gave him practical exercises to adapt and improve his mindset.

We helped Scott focus on his ideal client, clarify the value he provided for them, and structure his offers — practices you'll learn later on in this guide.

All of this helped him build up tremendous momentum. He put his head down, did the work, and his confidence began to skyrocket.

His fear and doubt began to fade away. He was too busy implementing, providing value, and talking to buyers.

A few weeks into our program, Scott had so many clients that he had to learn how to avoid getting stressed out. Of course, we helped him with that, too.

We helped Scott learn the right way to think. Then, we encouraged him to take imperfect action.

This combination is how you build your entrepreneurial consulting mindset.

It's like working out at the gym.

First, you have to identify which part of your body you want to strengthen. Then, you do specific exercises to strengthen it.

With enough consistency, you'll build up a powerful entrepreneurial consulting mindset — one that will ensure your success in this business.



## Action Step

The most successful entrepreneurial consultants I know have an abundance mindset instead of a scarcity mindset.

With an abundance mindset, you believe there are always new opportunities out there.

But with a scarcity mindset, you believe that there are limited opportunities.

Unfortunately, as an employee, many of you lean towards a mindset of scarcity.

By the nature of your employment, you're forced to think small, avoid risk, and fear competition. Resources are limited, so you tend not to invest in yourself.

You're thinking like an employee instead of like an entrepreneurial consultant.

And until you change the way you think, you can't achieve success as an entrepreneurial consultant.

**Here is a very simple exercise you can use to recognize your current thinking patterns and improve your mindset.**

First, write down 3 ways you currently practice a "scarcity" mindset:

(ex: I'm afraid of being replaced at my work)

- 1.
- 2.
- 3.

Second, write down 3 ways you would like to practice an "abundance" mindset:

(ex: I would like to invest in a course that will help me improve my skills and become more valuable)

- 1.
- 2.
- 3.

Improving your mindset starts by recognizing your current, outdated ways of thinking that don't serve you.

By writing these down, you'll know exactly where you can disrupt your current thinking — and replace your old thoughts with a more abundant, entrepreneurial way of thinking.

Start thinking like an entrepreneurial consultant. Your actions and results will soon catch up.

## STEP 3

# Collaborate With Your Employer

Here's a fascinating statistic for you...

For most consultants, their first client is a former employer. 24% of consultants said their first client was their previous employer from their most recent job. And 28 % said that their first client was from any previous employer.

(Taken from our 2022 How To Become A Consultant Study)

You might want to quit your job. But that doesn't mean you have to quit doing work for your employer.

You can work with them as a consultant instead.

And for some of you, you might prefer to start consulting on the side before you quit your job.

Either way, you must learn to discuss this and collaborate with your employer.

First, think about which of the 2 **corporate-to-consultant** transition strategies best suits you, **taking into account** your financial situation and your risk tolerance: ( or ...**strategies best suits your financial situation and your risk tolerance:**)

### 1. The Side Transition:

You start consulting on the side while you work in your corporate job. 65% of consultants take this approach. It's a lower-risk approach to starting a consulting business. It allows you to test and validate the demand for your services while you still have income from your 9-5 job.

### 2. The All-In Transition

You quit your job and go all-in on your consulting business with little to no pre-existing income from it. 35% of consultants take this approach. With the All-In Transition, you'll see faster results. You're committed. You have to generate an income, and that means you'll have to put more time and energy into it.

Now, after you decide on your transition strategy, you'll have to think about how to approach your current employer.

Consulting is a relationship business. If you want to consult for your former employer, don't burn that bridge.

If you serve your employer as a consultant, you work together as peers. You get to collaborate on the best ways you can provide value for them instead of them telling you what to do.



**Husain Shekhani, PhD**

Founder & Lead Consultant at Ultrasonic Advisors

## **How Husain Shekhani Became Independent — And Turned His Employer Into His First Client**

Husain Shekhani is the founder and primary consultant for Ultrasonic Advisors.

He helps his clients develop, improve, and optimize ultrasonic devices.

While he was working as an employee, he got the urge to become a fully independent consultant.

However, he lacked the mindset, confidence, and business know-how to make it happen.

He wanted to continue his work with his previous employer — he just wanted to do that on his terms instead of theirs.

We helped Husain approach this conversation as a collaboration.

As a result, Husain started his consulting business and won his first client: his employer.

How did he do it?

He focused on the benefits for them.

Unlike a full-time employee, he explained that they didn't have to pay him a full-time salary, provide benefits, or give him bonuses.

They only needed to pay him for the value and results he created.

He positioned it as a win-win scenario.

For Husain, he got to work them as a consultant instead of as an employee. That means he could also work with other clients.

For his employer, they got to benefit from his expertise and knowledge without having to pay him a full-time salary.

As long as you keep the conversation focused on the benefits for your employer, then you have an excellent chance of turning them into your first client.

You'll learn how to do this in the action step on the next page.



## **Action Step**

None of this will happen until you schedule this conversation with your employer.

Send them an email to schedule the conversation, and write down the date you'll have it with them.

Use the following talking points during the conversation with your employer:

- Your idea of doing consulting on the side
- If your employer supports the idea or not
- How it will benefit them if you do start consulting on the side
- Whether or not they have any advice for you
- If they know anyone you should talk to (referrals, mentors, etc)
- Their thoughts about you serving them as a consultant instead of as a full-time employee (explain the benefits for them)

After the conversation — and based on how it goes — you'll need to make a decision.

Perhaps they DO allow you to do consulting on the side. Then, you can continue with the side-transition strategy.

Or maybe they DON'T want you doing consulting on the side. That means you might have to stick it out, build up your cash reserves, and then, when the time is right, follow the all-in transition strategy.

This conversation will shed light on the role your employer will play at this beginning stage.

Maybe they're supportive. They want you to experiment and be more entrepreneurial. They will benefit from this because you'll learn new skills which will benefit them.

Or maybe they're not supportive. They have a strict policy about employees not taking on side work. If your dream is to work for yourself, now you know your employer doesn't have your best interest.

If your employer knows you, likes you, and trusts you, you can turn them into your client instead of your boss.

And if you can turn your employer into a client, then you can turn other business owners into your clients.

## STEP 4

# Declare Your Specialization

One of the hardest things for entrepreneurs to do is niche down and select a specific industry to target.

By definition, we're highly creative and opportunistic people.

We thrive on possibility and leaving doors open.

However, specializing is one of the most important — yet counterintuitive — things you must do as a new consultant.

You might think positioning yourself puts you into a corner.

I hear this all the time. It's not true.

Here's an example.

Adam is a new business consultant who wants to get clients.

He doesn't know who his ideal client is, and he hasn't decided on what service offerings to focus on.

So, he goes and does what most new consultants do.

He networks. He tries to win speaking opportunities. He writes some blog posts.

But there's nothing to set Adam apart from all the other business consultants out there.

He hasn't declared an area of specialization. He's just another small fish in a big pond.

Jen, on the other hand, is a marketing consultant.

Unlike Adam, Jen has declared her area of specialization: marketing consulting for upscale female fashion brands.

She helps female fashion brands generate more sales through digital marketing.

She writes articles about this specific topic — often on websites that are read by female fashion brand owners. She speaks at fashion events. She networks with people running these types of businesses.

Now, which consultant do you think will see greater success?

Which will spend less money trying to reach their ideal clients?

Which will feel and be more focused?

You get the point, right?

Specialization helps you accomplish all of this.

Marketing — getting the attention of your ideal clients — is the #1 challenge for new consultants.

And specialization is the best way to stand out, get the attention of your clients, and start conversations with them — which is the first step to winning them as a client.



**Earline Lagueruela**  
Chief Executive Officer of B2GSA

## **How Earline Declared Her Area Of Specialization (& Doubled Her Consulting Revenue)**

Earline Lagueruela was the first woman ever to run an ad agency in San Antonio — all the way back in 1976.

After more than thirty years in business, she sold her agency.

Then, she decided to start a consulting firm to help advertising and communications firms identify and land contracts with the federal government.

With her experience running an ad agency, she knew how to serve her clients well.

However, she struggled to hone her offers and clarify her strategy.

Armed with such a wide breadth of experience, Earline had difficulty declaring her true specialty.

She could provide value to her clients in many different ways. Why should she need to specialize?

Just because you can provide clients with value in many different ways doesn't mean you should.

Before working with us, Earline offered business consulting, crisis communications, LinkedIn profile design, and many more services.

We helped Earline focus on the "80/20" of her business — the 20% of her work that generated 80% of the results.

Her most profitable service came from helping clients get certified as GSA Schedule Holders (a type of long-term governmentwide contract).

And since that was her most profitable service, we taught her to make that her firm's area of specialization.

"B2B Marketing Growth" became "B2GSA" = Business To GSA.

By focusing specifically on GSA certification consulting, she positioned herself for sustainable, long-term growth.

With this area of specialization, it was much easier for her to get clients methodically by using LinkedIn and drip campaigns.

This change resulted in Earline doubling her revenue — all while working LESS, taking more time off, and running her entire business by phone.

Not only did declaring her area of specialization improve Earline's business — but it improved her quality of life as well.



## Action Step

Putting a stake in the ground and declaring your specialty is one of the most powerful things you can do in your consulting business.

This is why we teach Magnetic Messaging.

Magnetic Messaging is our formula designed to help you write your value proposition — and thus, communicate and declare your specialization.

Here's the formula:

***I help [WHO] to [solve WHAT problem] so they can [see WHAT results]. My [WHY choose me]...***

Let's break each part of the formula down.

- WHO: Who you serve.
- WHAT (Problem): What problem you solve for them.
- WHAT (Result): What result you create for them.
- WHY: Why they should choose you.

This formula is so effective because it covers everything your prospective clients want to know before they take a deeper look at you and your business.

And when you get SPECIFIC enough with it, it will attract the attention of your potential clients - like a magnet.

Go ahead and use the formula yourself. Write a few drafts down.

Most importantly, put your message to work.

Use it as your LinkedIn tagline. Add it to your email signature. Email it to EVERYONE in your network and ask them for feedback on it.

Action, action, action. Imperfect action.

And check out our article on [8 Powerful Value Proposition Examples \(& How To Write Yours\)](#) if you'd like to see more examples.

The earlier you specialize, the easier it will be for you to master the challenge that is marketing and sales.

You can always expand your target market and offerings in the later stages of your business.



**But in the early stages, it pays to be a specialist.**

**Make your specialization KNOWN.**

## STEP 5

# Create (& Validate) Consulting Offers

As an entrepreneurial consultant, it's not uncommon for you to sell \$50K-\$100K projects.

The consultants in our programs regularly win projects at these fee levels.

However, you'll need to build more trust with the buyer — and demonstrate a higher level of experience — to sell 6-figure projects.

And as a newer consultant, you might not feel ready to charge this much.

This is where the discovery session offer comes in.

A discovery session is a smaller-scope, lower-priced, introductory service to offer your consulting clients.

It creates tremendous value for both you and your potential consulting clients.

It's valuable for your clients because...

- It's inexpensive. Clients have a budget. If you fit within their budget, they're more likely to accept it.
- It involves the least amount of risk. Before you successfully complete a project for a client, they will feel a certain amount of risk — but a discovery session, as a smaller project, reduces this risk.
- It lays out the path ahead. A discovery session is like the blueprint for a house. It provides a plan for all further work and helps ensure the implementation is successful.

And valuable for you because...

- It's easier to sell. Unlike a full consulting engagement, discovery offers are easier and quicker to sell. They are lower-priced and don't require a proposal.
- It's typically fixed in price and scope. You don't need to worry about negotiation on the price of figuring out the deliverable. It's the same thing every time.
- It leads to larger engagements. You'll find that your clients who go through your discovery session often invest in a bigger project with you because you've set the stage for continuing work.

Before I share an example with you, let's talk about the word "offer."

As an entrepreneurial consultant, you sell your expertise and thinking which solve problems and create results for your clients.

It's best to package your expertise and thinking into an "offer" — a list of things you'll do for your client to solve their problem and achieve their results.

As an entrepreneur, you're now a creator — and you create consulting offers.

Your offer is how you generate revenue for your business. It's what you sell and what you deliver.

The more compelling your offer, the easier it will be to win consulting business.

And a discovery offer is one of the easiest offers for you to make and sell.



**Sam Schutte**  
CEO of Unstoppable Software

## **How Sam Schutte Implemented Discovery Offers To Increase Revenue By 60%**

Sam Schutte is a software/technology consultant and founder of Unstoppable Software.

His firm helps companies create software that overcomes operational efficiencies, saving them time and money.

Before working with us, Sam did free discovery work for clients before presenting them with a proposal.

It didn't work.

"I can't get approval for this amount of money," his buyers would respond after reading his proposal.

Sam regularly charges 6-figures for his consulting work. Going from free consulting to \$100K+ consulting threw his clients off.

So instead of giving away this discovery session work for free, he began charging for it.

For \$2500-\$5000, he'll spend an afternoon with the client and make a plan for their project.

They work out if their goals are feasible, what it would take to accomplish them, potential roadblocks, etc.

There is tremendous value in these types of conversations: value you should be capturing for yourself.

You can and should be charging for these conversations.

Clients are willing to pay for them as long as you help them solve a problem and achieve a result.

In Sam's case, he's solving the problem of identifying potential risks of software projects, which are notorious for their failure rates.

And he's creating the result in the form of a roadmap and plan that will ensure the project's success.

As a result of implementing discovery offers, Sam's firm won a \$250K engagement — and he increased his revenue by 60%.

The discovery offer is an incredibly powerful tool to add to your consulting toolkit.

## Action Step

Now, let's take action and start brainstorming your discovery offer.

Write down a single problem you can solve — or provide clarity on — for your ideal client.

Example: assessing the problems with a client's website that is causing them to lose revenue.

Next, write down the single result that solving that problem will create for your client.

Example: more revenue (leads and sales) through their website.

Finally, write down how you could solve their problem in the quickest way possible — while keeping your process as simple as possible.

Write down the steps, starting with the result.

7. RESULT

6.

5.

4.

3.

2.

1.

Finally, run your idea through our The Discovery Offer Checklist:

- Align with what the buyer wants
- Is a logical first step
- Leads to the next steps
- Typically ranges between \$1.5K to \$15K
- Provides tangible benefits (growth, clarity, etc)

If you follow these steps, you'll have a solid brainstorm of your first discovery offer.

As you begin reaching out to your ideal clients, you'll have something tangible to offer them — something that they can invest in.

Don't expect to win offers on your first try.

It's by making offers that you gain feedback, and use that feedback to improve them.

If you follow these steps, you'll have a solid brainstorm of your first discovery offer.



As you begin reaching out to your ideal clients, you'll have something tangible to offer them — something that they can invest in.

Don't expect to win offers on your first try.

It's by making offers that you gain feedback, and use that feedback to improve them.

So get out there, start talking to your ideal clients, ask questions to understand their problems and their desired results...

...and then offer them your expertise that can solve their problems and help them get their desired results.

## STEP 6

# Develop A Magnetic Brand

What comes to mind when you think of Rolex?

Prestige. Luxury. Quality.

That's what a brand is.

It's the perception you have about a company.

As a consultant, your brand is what your ideal clients think about you.

And you have the opportunity to craft that perception through your ideas, words, graphics — and most importantly, your actions.

Many new consultants struggle with branding.

As an employee, you don't have to think much about your brand.

You show up, do your work, and leave.

However, as an entrepreneurial consultant, you **MUST** think about your brand.

Why?

Because you want to win consulting clients.

And by building a powerful, magnetic brand, you can make the job of winning clients easier.

Consider this example.

You're looking for a physiotherapist to help fix your back pain.

You could hire any run-of-the-mill physiotherapist — the closest one down the street...

Or, you could hire Dr. Stuart McGill — the world's foremost expert on back pain.

The average physiotherapist — the one without a brand — just does their work and leaves.

But in-demand experts like Dr. Stuart McGill purposefully seek out to become known as industry authorities.

They deliberately position themselves as such — and most importantly, they do the work to prove it.

Now, branding for an entrepreneurial consultant doesn't have to be complicated.

The overarching principle is this: focus on your ideal clients instead of yourself.

Your brand — ideas, messaging, and graphics — should highlight your ideal client just as much (if not more) than it highlights you.

It's also critical to inject your personality and your unique point of view into your marketing.

By doing this, you will push out bad-fit clients - and attract clients who are the right fit for you.

If you build your brand around these concepts, you'll create a perception that your ideal clients can't help but be attracted to.



**Jason Fearnow**  
CEO & Founder of Prime  
Contract Solutions

## **How Jason Fearnow Built An Industry-Leading Consulting Brand To Hit Consistent 6-Figure Months**

Jason Fearnow is a mining consultant.

In his company, Prime Contract Solutions, he provides consulting and coaching services to mining companies. In particular, he helps them with capital development and major project execution.

Before working with us, Jason was struggling to win clients.

Despite the expertise he had in the industry, he didn't know how to position and brand himself as an authority in his industry.

And to make matters worse, he felt uncomfortable with the whole idea of marketing and branding.

He wanted to grow his business, but he was stuck.

As a member of our program, we helped Jason become more comfortable with the idea of marketing and branding.

Instead of making it all about him, we encouraged him to craft his messaging and marketing materials to focus on his clients.

He developed a brand about the way he wanted to do business: with a focus on integrity, trust, and ethics — something often missing in his industry.

By focusing relentlessly on portraying this philosophy — as well as his honest points of view and opinions — Jason clarified his focus.

And he started to attract clients at a much higher rate.

He was no longer afraid to put his true self out there. And his ideal clients couldn't wait to work with him.

As a result, Jason quadrupled his monthly income. He started having 6-figure months.

His messaging became more effective, clients gained a better sense of the value he has to offer, and his pricing structure made more sense for his work, clients, and industry.

All of this stemmed from clarifying his brand, putting himself out there, positioning himself as an authority in his industry — and taking action to provide value to his ideal clients.

## Action Step

There are many theoretical ways to approach your brand.

However, I want to make this practical for you.

One of the best things you can do for your consulting business and brand is to create a compelling LinkedIn profile.

It's important that you "brand" yourself as an entrepreneurial consultant and NOT an employee.

You're not looking for a new employer. You're looking for new clients.

To that end, we've created our own "Lead Generating LinkedIn Brand" checklist.

Use this checklist to help update your LinkedIn profile:

- A high-quality, relevant cover photo that contains your Magnetic Message
- A professional profile picture
- Magnetic Message is in your tagline
- Profile copy talks about your client more than you
- Profile copy talks about who you serve, what problems you solve for them, and what results you can create for them
- Has a direct, compelling call-to-action
- Lists your relevant licenses & certifications
- Lists your work experience and the outcomes you've achieved for your company
- Lists your different skills and abilities
- Features recommendations from previous employers

If you want to see an example of powerful consulting LinkedIn profiles, see the following examples from consultants in our community:

- [Douglas Nelson](#)
- [A. Nicole Campbell](#)
- [Nichole Hoban Kagwisa](#)

Notice how their writing and communication inform how you perceive them.

After reading their profiles, you can't help but think they are experts at what they do.

And by following this checklist, you'll create the same perception about your brand for YOUR ideal clients.



That will make them much more open to your outreach.

Don't forget: your brand is as much about your actions as it is about how you communicate yourself.

Focus on providing value to your ideal clients in everything that you do, and you'll create a compelling consulting brand.

## STEP 7

# Write Winning Consulting Proposals

So you've started having conversations with your ideal clients.

They're demonstrating interest in what you have to offer.

They've even expressed interest that they would like to work with you, and want to know the next steps.

This is where your consulting proposals come into play.

When new consultants think about proposals, they think of lengthy, wordy documents full of legalese.

We take a different approach.

The proposals written by the consultants in our community are short (2-3 pages), concise, valuable — and most importantly, they WIN.

Your proposal is the difference between winning and losing a consulting project.

They're a culmination of many consulting skills — you're ability to...

- Listen to the client
- Analyze their situation
- Create a plan to solve their problem
- Communicate back to them what they want
- Present your ideas effectively
- Close the deal and receive payment

...all packed into a neat, tidy, 2-page document.

If you can write consulting proposals that reliably win business, it shows that you have a firm grip on the fundamentals of this business.



**Mike Gammarino**  
Founder of Blueprint Partners

## How Mike Gammarino Won 7 Consulting Clients Using Our Proposal Strategies

Mike Gammarino is an eCommerce/Operations consultant who helps companies put together platforms, people, and processes that can scale.

Mike Gammarino is an eCommerce/Operations consultant who helps companies put together platforms, people, and processes that can scale.

Back when he was starting, he had plenty of expertise and value he could share with clients. But he didn't know the basics of how to run a consulting business.

One of the things Mike struggled with most was proposals. He was constantly thinking...



*"How can I write effective proposals that show the REAL value of my services?"*

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This is something he struggled with mightily — and it was costing his business.

Before working with us, he had "negative-two" clients. He had sent out two proposals and lost both of them.

But after a year of being in our program, he'd won 7 high-value clients.

There are many things you have to get right to win clients.

One of the most important pieces of this puzzle is your proposals.

How did Mike shift his proposal strategy from turning clients away to winning them consistently?

He followed our 7 proposal best practices:

**1. Don't Count On Your Proposal:**

You should only be presenting and sending a proposal to a buyer once you've engaged in a sales conversation with them and they've given you the go-ahead.

**2. Focus on The Buyer, Not Your Business:**

Your consulting proposal is about your buyer and their business, not yours.

**3. Keep Your Proposal Short:**

You want to get a signed proposal in the shortest time possible. Keep your language clear and simple in a short proposal — 2 pages max.

**4. Don't Include New Information:**

Keep the content focused on the discussion that you had with the buyer. Any new information will lead to confusion, and confusion leads to inaction.

**5. Include The ROI At The Front:**

Show the buyer how their investment will provide them with a significant (3X-10X+) return.

**6. Show What They'll Get, Not What You'll Do:**

Use your proposal to show what your client will get out of the engagement: the results and benefits their business will see.

**7. Consulting Proposals Aren't For Lawyers:**

Keep your language clear and simple — and avoid getting any lawyers involved.

By using our template and following these best practices, you'll write consulting proposals that help you seal the deal.

## **Action Step**

Now it's time to practice writing proposals.

First, download our consulting proposal template.

Second, fill out a "mock" version of the proposal. Imagine you were working with your ideal client and were writing a proposal for them.

When writing your proposal, make sure you follow our best practices.

As you begin to talk with buyers and have meaningful conversations with them, you'll learn what they want:

- Their goals
- Desired ROI
- Success metrics

Whenever they talk about specific problems they want solved and specific results they'd like to see, make a note.

This is the type of language you want to "echo" back at your client in your proposal.

And one more secret I'll share with you...

If you truly want to maximize your success with proposals, present your proposal on a call.

That way, you can answer any objections that come up — and customize your offer live on the call.

If you follow these best practices — and you present your proposal rather than just email it — don't be surprised if you win 70%-90% of your proposals.

Many of our clients are reaching those numbers.

Master the consulting proposal, and you'll be able to consistently win consulting projects.



## STEP 8

# Win Your First Client

Many aspiring entrepreneurs believe their business starts by writing a business plan.

Sure, you can write a business plan — but that business plan won't generate any revenue for you.

Revenue is what keeps your business running. And you generate revenue by winning clients.

So, the REAL start of your business is when you win your first client.

That's proof there is demand for your services.

If you can win one client, you can win two clients.

And if you can win two clients, you can win three — and many more after that.

However, as I've written previously, marketing and sales is the # 1 challenge for new consultants.

The good news is that all the previous 7 steps you've taken have prepared you to make that first sale.

1. You've gotten clear on your why.
2. You're thinking like a successful consultant.
3. You know where you stand with your employer (and maybe, you've already turned them into your first client).
4. You've proudly declared your area of specialization.
5. You've brainstormed on what you'll offer.
6. You've begun to build your magnetic brand.
7. You've created your winning consulting proposal.

You've done all of this work to help you prepare for the challenge of winning your first client.

And think about how you got your previous job. You had to make the "sale" to your employer to hire you.

It's similar to making the sale to clients and getting them to hire you.

If you've done the work up to this point, then you're ready to start reaching out to buyers, engaging them in conversations, and sending them an offer.

If you've done the work up to this point, then you're ready to start reaching out to buyers, engaging them in conversations, and sending them an offer.



**Martin Krumbein**

Owner & Management Consultant, onTarget

## **How Martin Krumbein Made More Offers — Increasing His Revenue By 100%**

Martin Krumbein is a strategy execution consultant for mid-sized businesses in Germany.

He helps his clients implement growth strategies by focusing on the key drivers of success in order to achieve their earnings goals.

When he first started his business, he was able to win clients via his referral network.

However, he lacked the ability to go out and win clients on his own.

He was committed to growing his business — but he had to learn how to generate clients in a way that didn't rely on luck.

We taught Martin how to build and maintain a solid pipeline of new business.

Not only that, we helped him develop a stronger and more well-defined offer.

Because he felt more confident in his offer and the value he would create for his clients, he was motivated to reach out to potential clients, knowing that he could create amazing results for them.

As a result, Martin increased his revenue by 100%.

He'd developed a marketing system that helped him win consistent clients, built a thriving pipeline, and restructured his pricing to win higher-value projects — all without working more hours.

## Action Step

Winning your first client begins by creating a list of ideal clients you'd like to work with.

We call this the "Lead Generation Foundation."

When you create a list of buyers who fit your ideal client criteria, then you can begin reaching out to them and engaging them in meaningful conversations.

Here's how to create this list.

Create a blank spreadsheet with the following headers:

- Name: the name of your ideal client.
- Company: the company of your ideal client.
- Website: the company's website URL.
- Phone Number: the ideal client's phone number.
- Email Address: the ideal client's email address.
- Outreach 1-7: the date and medium in which you reach out to the client (ex: 04/22/22 - phone call)

How do you find this information?

By using a tool like LinkedIn. LinkedIn Sales Navigator, in particular, will help you easily build a list of your ideal clients.

Do a search for your ideal client based on their industry, job title, location, company size — whichever criteria fits your target profile.

Write down the relevant information in your spreadsheet. You don't need all points of information. If they have a profile, you can reach out to them. Do this until you build a list of at least 50 ideal clients.

Then, 1 by 1, begin to reach out to each ideal client.

The main principle here is that you reach out to build a relationship, learn about the ideal client's situation, and provide value for them.

For example, here's a script you can send them:

### **Subject: Featuring your work**

*Hi X, I'm working on a new article about xtopic and I'm planning to feature Executive Directors like yourself to get your take on xtopic. I'd love to feature you and your organization in this if you're open to that?*

*Look forward to hearing from you.*

*Michael*

In this message, you are reaching out to them to gather their insights for a piece of content.

You're reaching out to them to start the relationship — but you're also providing value by creating content, and offering them to share their expertise in said content.

This might be an example of outreach 1.

You want to follow up with each ideal client at least 7 times.

Consider this: 95% of all converted leads are reached by the sixth call attempt. But nearly half of people in sales give up after just one follow-up attempt.

To win your first client, you'll need to follow up.

Get used to it, because the follow-up is what separates the consultants who win clients versus the consultants who don't.

Once you've done the outreach and have started to establish a relationship, then you're ready to try and get the ideal client on a call.

You might say something like...

*Hi X, this is Michael from Consulting Success. Have you found case studies, videos, and articles I've sent you helpful? I'd be happy to set up a time and walk you through step by step how we helped one of our clients increase their lead volume by 50% within 12 weeks and add \$500k to their bottom line if you'd like?*

Again, you're always focusing on the ideal client and providing value for them.

Continue to do this, and buyers will want to speak with you to learn about how you can solve their problems and achieve their desired results.

Have meaningful conversations with them, and if you can truly help get them the results they want, make them an offer.

You'll get a yes, and you'll seal the deal with your winning consulting proposal.

And if you get a no, you'll continue to follow this process, and learn from the feedback.



You'll improve with every message, call, and proposal.

These are the basics of what we call the "Marketing Engine:" the daily actions you take that will grow your business' revenue by enabling you to win clients.

And this is how you build a successful, thriving consulting business.

Winning your first client is a life-changing moment. It's the real "start" of your consulting business.

All you have to do is go from zero to one and win your first client.

After that, you're in the game. You'll possess skill that will enable you to never have to work for anyone else but yourself.

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## **Join Me To Kickstart Your Corporate To Consultant Transition**

So there you have it.

Follow these 8 steps, and I'm confident that with enough consistency, you'll win your first consulting client.

Believe it or not, you can build a thriving consulting business with a relentless focus on these basic fundamentals.

Dear reader, I hope you're excited about what your future holds. If you commit to this journey, you'll transform your career, your earning potential, and your lifestyle.

It will be one of the best things you do for yourself, your family, and your legacy.

And Consulting Success® is here to support you at every step.

Now, to provide you with even MORE help on your journey from corporate to consultant...

...I'm running a free, 3-day "Employee To Consulting Business Bootcamp," where I'll show you how it's done.



## Join The FREE Employee To Consulting Business Bootcamp

Here's the schedule:

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**DAY 1    The Entrepreneurial Consulting Opportunity:  
The Lowest-Risk, Highest-Profit Business in 2022**  
Wednesday, April 13 at 10:00 am Pacific/1:00 pm Eastern

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**DAY 2    How To Validate Your Consulting Area Of Expertise —  
& Get Introduced To Your First Client**  
Thursday, April 14 at 10:0 am Pacific/1:00 pm Eastern

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**DAY 3    How To Get Your First Consulting Client (With ZERO  
Marketing Or Sales Experience**  
Friday, April 15 at 10:00 am Pacific/1:00 pm Eastern

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**Would you like to join us?**

**[Click HERE to register your spot.](#)**

You'll be able to ask me questions about your situation at the end of each call.

If you can't make a session, we'll make the recordings available for 24 hours.

So be sure to register!



Helping Entrepreneurial Consultants  
Build Profitable, Scalable, and Strategic  
Consulting Businesses

**Michael Zipursky**  
CEO of ConsultingSuccess.com