

THE ONE-PERSON CONSULTING BUSINESS

COMPANION TOOLKIT • 24 EDITABLE WORKSHEETS

Use these tools alongside the book. Copy a worksheet for each prospect or engagement. Replace prompts with your own information; do not put confidential client information into any public or shared template. The examples are illustrative, not promises of financial results.

01 — Expertise Inventory

Find the experience clients will pay to access.

Industry and functional experience

Three consequential problems I have solved

Evidence that the work changed something

Experience other advisers may lack

People who have seen my work up close

Working instruction: Circle two recurring, valuable problems.
Describe each without using a job title.

Next action / owner / date:

02 — Expertise-to-Value Map

Translate competence into a buyer consequence.

My expertise

The buyer and their context

A costly or risky problem

The consequences of delay

**Improvement I can credibly help
create**

Proof and limitations

Working instruction: Write: I help [buyer] address [problem] so they can [result].

Next action / owner / date:

03 — Positioning Worksheet

Create one statement that a colleague can repeat.

Specific target market

Triggering situation

Costly problem

Desired outcome

Distinctive point of view

One-sentence introduction

Working instruction: Test it aloud with five people who know your work.

Next action / owner / date:

04 — Positioning Scorecard

Compare candidate niches instead of selecting by instinct.

Niche A / B / C

Urgency (1–5)

Ability to pay (1–5)

Access to buyers (1–5)

Credibility (1–5)

Personal interest (1–5)

Total and decision

Working instruction: Do not confuse a high score with proof; run interviews before committing.

Next action / owner / date:

05 — Ideal Client Profile

Identify accounts where your advice is feasible and valued.

Company size and type

Executive sponsor

Likely urgent trigger

Budget owner

Constraints and exclusions

Proof the client can implement

Poor-fit characteristics

Working instruction: Describe a real company that would qualify, without using confidential information.

Next action / owner / date:

06 — Client Qualification Scorecard

Decide what deserves a proposal.

Problem clarity

Cost of doing nothing

Sponsor with decision rights

Access to inputs and personnel

Timeline

Available investment

Culture and relationship fit

Proceed / nurture / decline

Working instruction: Score 1–5 and record the reason behind any weak rating.

Next action / owner / date:

07 — Consulting Offer Builder

Package the outcome and boundary.

Offer name

Who it serves

Client decision or outcome

Method and phases

Specific deliverables

Timeline

Client responsibilities

Not included

Fee and payment schedule

Acceptance criteria

Working instruction: Write the out-of-scope section before you quote the fee.

Next action / owner / date:

08 — Signature Method Builder

Standardize your process without standardizing conclusions.

Problem-entry criteria

Step 1: diagnose

Step 2: analyze

Step 3: decide

Step 4: activate

Step 5: review

Evidence captured after each stage

Working instruction: Name the method after using it on enough work to know it works.

Next action / owner / date:

09 — Pricing Worksheet

Calculate capacity economics before quoting.

Annual income goal

Annual overhead

Benefits and tax reserves (with qualified advice)

Available billable weeks

Target billable days per week

Required average realized day value

Quoted engagement fee

Effort budget

Expected contribution

Working instruction: Example: a \$12,000 engagement requiring 12 days yields \$1,000 per day before overhead and taxes.

Next action / owner / date:

10 — 90-Day Authority Plan

Earn recognition with a limited publishing commitment.

Specific market issue

Core point of view

Three recurring themes

Primary channel

Weekly content unit

Six headline ideas

Proof assets to develop

Conversation invitation

Working instruction: Measure relevant responses and calls, not views alone.

Next action / owner / date:

11 — Simple Consulting CRM

Keep promises and next actions visible.

Account

Contact and role

Referral/source

Problem and buying trigger

Stage

Estimated fee

Probability or confidence

Next step

Next step date

Last meaningful contact

Working instruction: Review weekly; no opportunity remains active without a dated next action.

Next action / owner / date:

12 — Referral and Outreach Scripts

Ask for a conversation without a canned sales pitch.

Warm reconnection

Specific referral request

Trigger-based introduction

After-meeting follow-up

No-response follow-up

Polite decline

Working instruction: Example: I've begun helping [kind of company] work through [specific issue]. If anyone comes to mind, I would value an introduction; no obligation.

Next action / owner / date:

13 — Discovery Conversation Guide

Find out what a prospect needs and whether you can help.

Current context

What prompted this conversation?

What is not working?

What has already been tried?

Consequence if nothing changes

Desired decision/outcome

Decision makers

Timing and budget

Agreed next step

Working instruction: Reflect the problem back in the buyer's words before describing an offer.

Next action / owner / date:

14 — Consulting Proposal Template

Make the business decision easy to review.

Client situation

Objectives and success measures

Recommended approach

Phases and deliverables

Timeline and dependencies

Responsibilities

Explicit exclusions

Fee and billing terms

Change control

Acceptance and next step

Working instruction: Have the prospective sponsor review the approach verbally before sending.

Next action / owner / date:

15 — Scope of Work Outline

Protect both parties by writing down the engagement boundaries.

Services covered

Deliverables and acceptance

Milestones

Client-supplied information

Named decision maker

Fees, invoices, payment schedule

Confidentiality and data handling

IP and license terms

Change process

Termination and dispute provisions

Working instruction: This is an operational outline, not a substitute for a lawyer-drafted agreement.

Next action / owner / date:

16 — Kickoff Checklist

Prevent the first-week confusion that costs weeks later.

Signed agreement

Initial payment details

Sponsor and participants

Data access permissions

Deliverable examples

Kickoff agenda

Milestones

Standing update cadence

Risk register

Decision log

Working instruction: Confirm each item in writing after the kickoff.

Next action / owner / date:

17 — Engagement Dashboard

Run the work without losing sight of the decision.

Client and engagement

Current objective

Milestone status

Deliverables complete

Next two actions

Owner and due date

Open decisions

Risks/dependencies

Fee burn / profitability check

Working instruction: Review for ten minutes before each client update.

Next action / owner / date:

18 — Weekly Client Update

Write updates a busy sponsor can use.

Completed this week

What we learned

Decisions requested

Risks or blockers

Next week

Client inputs needed by date

Working instruction: Keep the update to one screen when possible.

Next action / owner / date:

19 — Scope Change Request

Make new work a clear commercial choice.

Original scope

New requested work

Business reason

Fee change

Schedule change

What will be deferred

Approval and date

Working instruction: Offer explicit options: add fee, swap priorities, or schedule a later phase.

Next action / owner / date:

20 — AI Workflow Map

Choose where AI assists and where judgment remains human.

Workflow name

Input types and sensitivity

Tasks safe for AI assistance

Required source citations/verification

Human decision owner

Client consent or restrictions

Output storage and deletion rules

Working instruction: Never feed confidential client materials to an unapproved tool.

Next action / owner / date:

21 — Knowledge Vault Index

Turn repeatable learning into organized assets.

Asset name

Type: prompt/framework/checklist

When used

Owner and permissible reuse

Confidentiality review

Last validated

Next update

Working instruction: Save the method, not confidential client facts.

Next action / owner / date:

22 — Recurring Revenue Planner

Define a service the client will want to renew.

Continuing business problem

Monthly or quarterly decisions

Cadence and access

Specified deliverables

Response boundaries

Fee and term

Renewal criteria

Exit process

Working instruction: Avoid an unlimited-access retainer with no definition of value.

Next action / owner / date:

23 — Capacity Planner

Make income and calendar constraints explicit.

Working weeks

Desired days per week

Client delivery days

Business development days

Administration time

Client limit

Annual fee capacity

Reserve and contingency time

Working instruction: Example: three delivery days each week leaves two for growth and operation.

Next action / owner / date:

24 — 90-Day Launch Planner

Turn an aspiration into visible evidence.

Days 1–30: choose buyer and offer

Days 1–30: five market conversations

Days 31–60: publish useful proof

Days 31–60: warm outreach

Days 61–90: qualified discovery

**Days 61–90: proposal and delivery
learning**

Weekly review

Decision at day 90

Working instruction: Do not measure success only by signed revenue; track validated buyer demand and repeatability.

Next action / owner / date:
