

A CONSULTING PRACTICE SKILL SET

Fourteen skills for a solo or small firm. One set of rules underneath all of them.

An example. Yours will look different.

THE FOUR AREAS

- Foundations
- Relationships
- Visibility
- Client Work

BAND 1: RUNS ON ITS OWN Scheduled. No one starts it.

Arrivals Check

MONDAY MORNING

Everything that landed on client work last week, with a recommended ruling for each item.

Scope Check

FIRST BUSINESS DAY OF THE MONTH

Every live engagement read against its signed agreement.

Friday Close

FRIDAY MORNING

The week's numbers across all four areas.

The Read

FRIDAY, RIGHT AFTER THE CLOSE

What the numbers mean and what needs a decision.

Post Builder

FRIDAY AFTERNOON

What you said this week becomes next week's posts.

BAND 2: WHEN YOU CALL IT On demand. The work names the moment.

Call Debrief

After a call. CRM updates, the follow-up email, tasks, and the lines worth keeping.

Engagement Standard

During an engagement. Stages, decisions, the change log, and the numbers you track.

Client Assessment

Before and after an engagement. Where their operations stand, scored from evidence.

Proposal Writer

When a prospect is ready. A full proposal in your voice.

Fit Check

When you want to know if someone fits your ideal client.

Referral Partners

When a partner relationship moves. Who sends work, who you send to, and who you trust.

Podcast Pitch

When a show is next on your list. A finished guest pitch.

Database Guide

When a client runs on a system you need to know cold.

THE FOUNDATION

Our Voice and Rules

How you sound, what you never say, and what never goes into the machine. Client names stay out. Every skill above reads from it.