



MODULE 16

Promote a Consulting Practice Checklist

Process	Comment	Date Completed or N/A	Needs Additional Analysis (✓/)
<p>Understand client's needs and Maslow's Hierarchy of Needs Theory:</p> <ul style="list-style-type: none">■ Physiological■ Safety■ Love and belonging■ Esteem■ Self-actualization■ Even small businesses and SMEs have needs <p>(See Section 16.1 and 16.2)</p>			
<p>Recognize the valuable service you provide:</p> <ul style="list-style-type: none">■ Stress client outcomes vs. expense■ Consider starting with a SWOT analysis <p>(See Section 16.3)</p>			
<p>Review various billing options and decide how you will bill:</p> <ul style="list-style-type: none">■ By the hour■ By the engagement■ Monthly or quarterly retainer■ Request partial upfront fee <p>(See Section 16.4)</p>			

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<p>Work on client relationships:</p> <ul style="list-style-type: none"> ■ Make each client feel special, valued, and the most important client you have ■ Make recommendations specific to each client's situation ■ Keep everything you see and hear about a client confidential ■ Avoid conflicts of interest <p><i>(See Section 16.5)</i></p>			
<p>Use the following to build your reputation:</p> <ul style="list-style-type: none"> ■ Website ■ Search engine optimization ■ Pay per click advertising ■ Social media ■ Brochures ■ Networking, word-of-mouth, referrals ■ LinkedIn profile ■ Newsletter ■ Prospecting or cold calling ■ Speaking engagements ■ Publicity <p><i>(See Section 16.6)</i></p>			
<p>For all consulting engagements, consider:</p> <ul style="list-style-type: none"> ■ Using a written engagement letter ■ Have errors and omission insurance <p><i>(See Section 16.7)</i></p>			

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<p>Written report format. Are the following sections included?</p> <ul style="list-style-type: none"> i. Cover Page ii. Report Overview/Executive summary <ul style="list-style-type: none"> a. Short overview of consulting engagement b. Objectives c. Preliminary findings iii. Table of Contents iv. Introduction/Purpose of Engagement v. Documents, procedures, processes, or departments reviewed vi. Methodology vii. Findings <ul style="list-style-type: none"> a. Category #1 b. Category #2 c. Etc. viii. Recommendations/ Plan of action <ul style="list-style-type: none"> a. Recommendation #1 b. Recommendation #2 c. Etc. ix. Summary/Conclusions x. Appendix/Exhibits <p>(See Section 16.7.4)</p>			

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<p>Consider the following optional sections in a written report:</p> <ul style="list-style-type: none"> ■ Project goals ■ Priorities and timeline ■ Organizational structure ■ Employee comments or interviews ■ Business or strategic plan ■ Marketing plan and target market ■ Mission and vision statement ■ Resume or short biography <p>(See Section 16.7.4)</p>			
<p>Practice makes perfect. If you are new to small business/SME consulting, have you?</p> <ul style="list-style-type: none"> ■ Completed any complimentary engagements? ■ Reviewed the <i>SEMP Approach</i> checklists? ■ Presented recommendations and results in person? ■ Written and delivered a bound report? ■ Asked for feedback? <p>(See Section 16.8)</p>			
<p>Whether a new or experienced consultant, do the following:</p> <ul style="list-style-type: none"> ■ Take the exam to become an Accredited Small Business Consultant (ASBC) or Accredited SME Consultant (ASMEC) 			