CONSULTING SERVICES BUSINCES MATURITY DIAGNOSTIC

October 9, 2025

www.veloquentconsulting.com

Prepared exclusively for:

{{ user\_information.company }}

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| A group of people working on a project  AI-generated content may be incorrect. |

# Welcome!

{{ user\_information.first\_name }} - thank you for taking the time to complete the Veloquent Consulting Maturity Diagnostic and to explore Veloquent’s offerings. Enclosed are your personalized diagnostic results and recommendations based on your specific responses.

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| **‘Meta Assessment’**  This diagnostic was created using the same platform, structure, and principles it is designed to evaluate. In other words, the Veloquent diagnostic tool demonstrates its value by example, an example tailored for you.  This meta-assessment uses Veloquent IP, open-source tools, plus the OpenAI API to collect responses, apply structured logic, generate tailored insights and recommendations – just as it would for your business and your unique offerings and capabilities. By using the tool, you’re not only receiving an evaluation, but you’re also seeing firsthand how a guided, data driven, AI -augments diagnostic can be packaged into a high impact selling tool for client and prospects. |  | **Shared Insights**  Throughout the assessment you’ll find black text boxes like this one. These boxes are meant to speak directly to you as a consulting expert and seller of professional services. The content is meant to share lessons learns and insights on how to apply Veloquent’s diagnostic to your own business. We understand clients increasingly expect structure, insight, and direction from their most trusted advisors. By aligning assessment questions to real capabilities and surfacing meaningful gaps, the Veloquent assessment, with your expertise, can build both trust and urgency with your prospects. At Veloquent, we help consulting firms turn their expertise into diagnostic tools like the one you experienced; tools that create credibility, guide strategic conversations and convert insight into action. |

# Executive Summary

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| A black and white photo of chairs in a conference room  AI-generated content may be incorrect. |

{{ executive\_summary }}

# Diagnostic Approach & Overview

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| This diagnostic assessment is designed specifically for consulting firms aiming to improve their go-to-market performance, service packaging, and client retention strategies.  The assessment asked you to reflect on 25 statements across 5 core areas essential to running a successful consulting business. The categories included:  **Positioning & Differentiation** – How clearly you stand out in the market and articulate your value  **Service Offering & Value Design** – How your offerings are structured, priced, and aligned with client needs.  **Client Growth & Demand Generation** – Your firm’s ability to turn satisfied clients into advocates and repeat business.  **Delivery & Client Experience** – The quality, consistency, and scalability of your project execution  **Retention, Referrals, Relationship Growth** – Whether you have a consistent, repeatable approach to business development. | A group of people working on a project  AI-generated content may be incorrect. | |
| **Scoring**  Each question was scored on a scale of 0 (*ad hoc*) to 4 (*scalable best practices*). However, the real power of this tool isn’t the scores, it’s what they reveal:   * Where you’re strong * Where you’re potentially leaving money on the table * …and what specific next steps you can take to unlock your full potential | |
|  | |
| **ASK THE RIGHT QUESTIONS**  Questions with solid fillGreat questions don’t just gather data; they frame worthwhile conversation. A good diagnostic maps directly to the capabilities that matter most to your prospects and customers, making gaps obvious and next steps actionable.  For Executive teams, great questions build alignment. For prospective buyers – they build trust.  Veloquent designs and implements assessments that are not only diagnostic, but strategic. These tools help drive meaningful conversation, insight, and sales momentum. With Veloquent, you’re not just asking questions, you’re opening doors to meaningful engagement. | |

# Strategic Insights and Analysis

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| A hand holding a glass ball  AI-generated content may be incorrect. | **RIGHT QUESTIONS**  posuere luctus libero, egestas rutrum libero feugr. Phasellus quis laoreet velit. Maecenas gravida felis eu dolor venenatis, ac blandit nunc dictum. Aenean sit amet turpis justo. Sed porttitor vestibulum enim |

{{ contradictions\_insights }}

# Challenge Questions

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| A person from a cliff  AI-generated content may be incorrect. |

{{ challenge\_questions }}

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| **Leverage GenAI to foster meaningful Post Diagnostic Engagement**  This section is an example of how AI can help put you right in the center of a meaningful post diagnostic workshop. Use the diagnostic results, and these self-reflection questions to help to highlight improvement challenges, friction points and position yourself as a leader and invaluable resource to your prospect. |

# Response Analysis and Recommended Actions

**Summary of Scores / Comparison to Industry Norms**

{% if radar\_plot %}

{{ radar\_plot.show(width="5in") }}

{% else %}

Radar Chart: Data not available

{% endif %}

{% if lollipop\_plot %}

{{ lollipop\_plot.show(width="6in") }}

{% else %}

Lollipop Plot: Data not available

{% endif %}

**Detailed Response Analysis**

{%p for i in range(question\_prompts|length) %}

**Question / Assessment Statement {{ i + 1 }}:**

*{{ question\_prompts[i] }}*

**Your response:**

{{ answers[i] if i < answers|length else 'No answer' }}

{% set lvl = (answer\_levels[i] if i < answer\_levels|length else -1) -%}

{% if lvl == 4 -%}

*You've reached the highest maturity level in this area. Focus on maintaining excellence.*

{% else %} **Recommended ‘Next Best Action’:**

{{ improvement\_matrix[i][lvl] if 0 <= lvl < (improvement\_matrix[i]|length) else '' }}

{% endif %}

{%p endfor %}

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| **Automate Visualizations and Specific/Actionable Recommendations**  **Visualizations**  As part of this demo diagnostic, we’ve included two common diagnostic visualizations, the radar plot (or spider diagram) and the lollipop plot. Additional charts can be added by Veloquent consultants, or by your own technical experts using python.  **Next Best Action**  Although genAI is incredibly powerful, AI will never replicate the personal experiences, industry context and value that sets you apart from your competitors. These experiences are your competitive advantage and are what enables you to win. Consequently, we’ve chosen to implement “next best action” recommendations from a prepopulated library we co-develop (or simply curate) with you. This approach ensures you’re 100% confident in the recommendations you provide and lets you highlight your unique experiences and insights for your prospects. |

# Recommended Services

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| A person standing in front of a window  AI-generated content may be incorrect. |

Veloquent has a diverse set of capabilities and relevant experiences we believe would be valuable to {{ user\_information.company }} Based on your responses to the diagnostic, our understanding of your priorities ( {% if selected\_pain\_points\_details and selected\_pain\_points\_details|length > 0 %}

{% for pain\_point in selected\_pain\_points\_details %}

{{ pain\_point['title'] }}

{% endfor %}

{% endif %}

), and your current business environment, we believe the following Veloquent offerings would produce tangible business value:

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| {{ recommended\_services }} |

# Recommended Services – Details of Top 3 Offerings

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| **A Note About Offerings**  The next section includes 3 Veloquent Offerings. These 3 offerings are standalone Word inserts, chosen by the AI engine from a larger library and deemed to be the offerings that would have the most impact based on your specific diagnostic responses and the prioritized industry pain points you selected. Obviously, these offerings could have been simpler capabilities statements and could have included “must have” offerings that are presented to every prospect, in every circumstance. |

**{# ===========================**

**Dynamic Inserts for Top 3 and Other Services (no hardcoded filenames)**

**Requires:**

**- top\_three\_template\_paths: ordered list of 3 template paths (preferred)**

**- top\_three\_offerings: list of 3 offering names (fallback)**

**- offering\_document\_files\_list: list of doc objects with .name / .filename / .template\_path**

**=========================== #}**

**{% if offering\_document\_files\_list %}**

**{# --- helpers (for fallback) --- #}**

**{% macro norm(s) -%}**

**{{- (s or '')|lower|replace('&','and')|replace('—','-')|replace('–','-')|replace(' ',' ')|trim -}}**

**{%- endmacro %}**

**{# robust match: does this doc correspond to a specific offering name (fallback) #}**

**{% macro strong\_match(off\_name, doc\_name) -%}**

**{%- set o = norm(off\_name) -%}**

**{%- set d = norm(doc\_name) -%}**

**{%- set toks = o.split()[:3] -%} {# first 2–3 words as signal #}**

**{%- set toks\_all\_in = (toks|length > 0) and (toks | select('in', d) | list | length == toks|length) -%}**

**{{- (o and (o in d or d in o)) or toks\_all\_in -}}**

**{%- endmacro %}**

**{# track which doc template\_paths were selected for top 3 to exclude from others #}**

**{% set ns = namespace(selected\_paths=[]) %}**

**{# ===================== TOP 3 (ORDER GUARANTEED) ===================== #}**

**{% if top\_three\_template\_paths and top\_three\_template\_paths|length == 3 %}**

**{% for tpl in top\_three\_template\_paths %}**

**{{ include\_docx\_template(tpl) }}{% if not loop.last %}**

**{% endif %}**

**{% set ns.selected\_paths = ns.selected\_paths + [tpl] %}**

**{% endfor %}**

**{# ===================== FALLBACK (NAME MATCHING) ===================== #}**

**{% elif top\_three\_offerings and top\_three\_offerings|length > 0 %}**

**{% for off in top\_three\_offerings %}**

**{% set off\_included = false %}**

**{% for doc in offering\_document\_files\_list %}**

**{% if not off\_included %}**

**{% set doc\_name = doc.name or doc.filename or doc.template\_path %}**

**{% if strong\_match(off, doc\_name) and (doc.template\_path not in ns.selected\_paths) %}**

**{{ include\_docx\_template(doc.template\_path) }}{% if not loop.last %}**

**{% endif %}**

**{% set ns.selected\_paths = ns.selected\_paths + [doc.template\_path] %}**

**{% set off\_included = true %}**

**{% endif %}**

**{% endif %}**

**{% endfor %}**

**{% endfor %}**

**{% endif %}**

**{# ===================== OTHER SERVICES ===================== #}**

**{# Other Available Services**

**========================**

**{% for doc in offering\_document\_files\_list %}**

**{% if doc.template\_path not in ns.selected\_paths %}**

**{{ include\_docx\_template(doc.template\_path) }}{% if not loop.last %}**

**{% endif %}**

**{% endif %}**

**{% endfor %} #}**

**{% endif %}**

# About Us

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| A person in a suit with his arms crossed  AI-generated content may be incorrect. | **Veloquent Consulting** helps small and mid-sized consulting firms win more of the right business, not just deliver great work.  Founded in 2025 by Elvis Burcul, an experienced software and consulting services seller, technology leader, and consultant who’s spent years pursuing, winning, and delivering complex projects, proposals, while maintaining client relationships.  We help firms sharpen their positioning, design and deliver diagnostic assessments that foster meaningful conversation, generate demand, and package their expertise into clear, outcome-based offers. |

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| **Let’s Put Your IP to Work for You**  If this experience sparked an idea for how you could use something similar with your own clients, let’s talk!  We’ve in the process now of helping firms like yours   * Build client facing diagnostics from scratch * Translate frameworks into high converting assessments * Integrate scoring logic, visuals, and AI driven insights * Use diagnostics to sell more services and productize what you already know   Let’s turn your expertise into something tangible, scalable, differentiated. |

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| **Why Diagnostics Work (And Why You Should Use One)**  As a consulting firm, your biggest advantage is the clarity and confidence you provide to your clients. But too often, firms like yours leave their own growth to chance-relying on word of mouth, intuition, and project-by-project hustle.  This assessment flips the script:  It brings the same structure, insight, and objectivity you offer your clients— back into your own firm.  Even more importantly: you can use this exact approach with your own clients.  Imagine having your own assessment that helps you:   * ﻿﻿Diagnose a client's pain in a credible, repeatable way * ﻿﻿Deliver value before the sale-positioning you as a partner, not a vendor * ﻿﻿Create a natural bridge to paid services * ﻿﻿And, differentiate your firm with a proprietary diagnostic   At Veloquent we don't just build assessments, we help build a sales pipeline.  With the right structure, design, and integration, an assessment can become a lead generator, a conversation starter, a sales accelerator, and a productized entry point into your deeper work. |