

# Chapter 8: The Chinese Menu Technique

What does AI and a Chinese menu have anything in common?

Typically, absolutely nothing. But after a recent engagement my agency just closed, we were educated—literally, by the client—on a new way to package our services. It's a method some companies, especially at the Fortune 500 level, not only prefer but expect to see from their vendors.<sup>1</sup>

This isn't about a new tool or a complex automation. It's about a paradigm shift in how you package and sell your consulting services, especially for education-heavy engagements. This one technique changed how we're going to approach closing deals forever.<sup>1</sup>

## The Origin Story: "We Want the Light Version of 8"

The story begins, as many of these do, with a series of discovery calls. We were three calls deep with a major client in the financial sector. We'd built rapport, we understood their problems, and we were getting ready to talk proposals.<sup>1</sup>

Then, they hit us with a question I was completely unprepared for.

"This is great," the client said. "Can you send us your Chinese menu?"

I was a deer in headlights. I had absolutely no idea what they were referring to. I didn't even get the analogy. After an awkward pause, I finally just admitted it.<sup>1</sup>

"I... have no idea what you mean by that," I said.

The client laughed. "Oh, it's simple," he explained. "In a Chinese menu, you have tens, sometimes hundreds, of items to choose from across five or six pages. Can you give us enough variety of the different things you could teach our team so they can just pick the specific items they want?".<sup>1</sup>

A lightbulb went off.

So, I took them literally. I went back and built them a literal "Chinese menu." It wasn't very well

formatted at first—just a document listed out as "Order #1: ChatGPT Mastery," "Order #2: Prompt Engineering," and so on. We listed out about 30 different modules we could teach.<sup>1</sup>

We sent it over and scheduled the final closing call.

This, I thought, is where the magic happened. We hopped on that last call, and instead of a long, drawn-out negotiation over a vague proposal, they just looked at the menu we sent.

"Okay," the client said, "we want 3, 4, 6, and the *light version of 8*."<sup>1</sup>

And they continued down the list. That's when it struck me. This is *genius*.

The real magic was in that single phrase: "the light version of 8." A standard, vague proposal—think "Silver, Gold, Platinum" tiers—is a blunt, inflexible instrument. A client can't come back and say, "I like your Gold Package, but can I get the 'light version' of it?" But this menu format *invites* that level of surgical customization. It de-risks the purchase for the client, allowing them to buy exactly the scope they need, no more and no less.

It completely changes the dynamic. You stop having a high-friction negotiation ("What's *really* included in this vague tier?") and start having a low-friction logistical conversation ("What items can I get for you?").

This is the strategic shift:

- **Most consultants:** Send a vague proposal with 2-3 generic service tiers.<sup>1</sup>
- **You (The Expert):** Send a professional, multi-page menu with 30, 40, or even 50+ specific, categorized offerings.<sup>1</sup>

This isn't just about client convenience; it's a powerful positioning tool. A three-tier proposal signals you can do three things. A 55-item menu signals you have *mastery* over the entire domain. It gives you that "been there, done that" authority and experience, even just from an optic standpoint.<sup>1</sup> The client sees your expertise before you even speak, which instantly builds trust and justifies the premium pricing we discussed in Day 1.<sup>1</sup>

## Designing the Menu: A Culinary Journey for the Client

That first menu was a rough draft. We've since refined it into a comprehensive, 55-item professional "AI Workshop Menu" that we can now send to any prospective client.<sup>1</sup>

The structure is the most important part. You must categorize your offerings like a real menu. We use five main tiers, plus pre-packaged "Banquets." Let's walk through the exact structure

of our "AI Workshop Menu 2025".<sup>1</sup>

## Appetizers (Beginner Level)

We start with Appetizers. These are the light bites, the foundational skills. Honestly, "ChatGPT Mastery" is still one of the best ways you can get your foot in the door at *all kinds* of companies, from small businesses to massive enterprises. They all want their teams to use ChatGPT *the right way* and to its fullest potential. And modules like "Custom GPTs & Claude Projects" are *always* crowd-pleasers. You must include them.<sup>1</sup>

Here is our current "Appetizers" list:

Module	Title	Description	Duration
1.	ChatGPT Mastery: GPT-5 & Latest Features	Unlock the 80% you're not using! Understanding GPT-5, GPT-4.5, and model variants. Canvas mode, Voice mode, ChatGPT Search, and productivity features.	25-35 minutes
2.	Claude Mastery: Claude Sonnet 4.5 & Opus 4.1	Discover Claude's powerful capabilities! Claude Sonnet 4.5 (best coding model), Haiku 4.5, and Opus 4.1. Understanding Projects, Artifacts, Analysis tools, and Computer Use.	25-30 minutes
3.	Google Gemini 2.5	Exploring Google's	20-25 minutes

	Pro: The Third Contender	latest AI model. Deep Research mode, long context windows (up to 2M tokens), multimodal capabilities, and integration with Google Workspace.	
4.	Prompt Engineering 101: The CORE Framework	Master the art of prompting! The CORE Framework: Context, Objective, Requirements, Examples. Structuring prompts for consistent results.	30-40 minutes
5.	Custom GPTs & Claude Projects	Build your first Custom GPT and Claude Project (live demo). Best practices for knowledge documents, preventing hallucinations. Use cases: HR policy assistant, investment analyzer.	35-45 minutes
6.	AI for Daily Productivity: Practical Quick Wins	Get immediate value today! Email drafting, meeting summaries, document analysis, research assistance, brainstorming.	25-30 minutes

		Template library for common tasks included.	
7.	Voice AI & Conversational Interfaces	Natural conversations with AI! ChatGPT Voice (Advanced Voice Mode), Claude's voice capabilities, multilingual support, and practical applications for hands-free work.	20-25 minutes
8.	AI Search: ChatGPT Search & Perplexity	The future of search is here! ChatGPT Search for real-time information, Perplexity for research. When to use traditional search vs AI search. Source verification.	20-25 minutes
9.	Reasoning Models: 01, 03, 04-mini Explained	When AI needs to think! Understanding OpenAI's reasoning models. Extended thinking for complex problems, use cases for STEM, math, coding, and strategic planning.	20-25 minutes
10.	Memory & Personalization in	Making AI remember you!	15-20 minutes

	AI	ChatGPT Memory, Custom Instructions, Claude Projects context. Managing what AI remembers, privacy considerations.	
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(Source: <sup>1</sup>)

## Soups (Practical Wins)

Next up are the Soups. These are the quick, practical wins that show immediate, tangible value and get the client excited. Think of modules for document intelligence, taming their meeting schedules, or creating stunning presentations with tools like Gamma.app or Beautiful.ai.<sup>1</sup>

Module	Title	Description	Duration
11.	Document Intelligence & Analysis	Master document workflows! Analyzing PDFs, contracts, reports. Extracting key information, summarization, comparing multiple documents. Claude's 200K context window.	25-30 minutes
12.	AI Meeting Assistants & Transcription	Never miss a detail! Otter.ai, Fireflies.ai, ChatGPT Record. Automated transcription,	20-25 minutes

		action item extraction, meeting summaries. Integration with Zoom, Teams, Google Meet.	
13.	AI-Powered Research Workflows	Research like a pro! Using ChatGPT Search, Perplexity, Claude, and NotebookLM for comprehensive research. Building research briefs, competitive intelligence.	25-30 minutes
14.	Data Analysis with AI	Turn data into insights! Analyzing spreadsheets and databases, creating visualizations. ChatGPT Advanced Data Analysis, Claude's Analysis tool. Handling CSV, Excel.	25-30 minutes
15.	Email & Communication Automation	Inbox zero made easy! Smart email replies, drafting professional communications, tone adjustment. Gmail and Outlook integration.	20-25 minutes
16.	AI for Presentations & Storytelling	Create compelling presentations! Structuring	25-30 minutes

		narratives, designing slides with AI, generating speaker notes. Tools: ChatGPT Canvas, Claude Artifacts, Gamma.app, Beautiful.ai.	
17.	AI Writing Assistant Workflows	Write better, faster! Blog posts, articles, reports, copy. GPT-5's improved writing capabilities, maintaining voice and style, overcoming writer's block.	25-30 minutes
18.	AI for Competitive Intelligence	Stay ahead of competition! Monitoring competitors, analyzing market positioning, tracking industry trends. Creating competitive analysis reports.	20-25 minutes
19.	Prompt Libraries & Template Systems	Build your prompt arsenal! Creating reusable prompt templates, organizing prompt libraries, sharing prompts across teams. Building a company prompt repository.	20-25 minutes

20.	AI for Social Media Content	Content creation at scale! Generating posts, captions, hashtags. Platform-specific optimization (LinkedIn, Twitter, Instagram). Maintaining brand voice.	20-25 minutes
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(Source: <sup>1</sup>)

## Main Courses (Intermediate Level)

Now for the Main Courses (what we called "Intermediate" in our first draft). This is where we get into the real "meat and potatoes" and the nuts and bolts. You'd be surprised; a module like "How Language Models Actually Work" isn't a common request, but some technical teams *really* appreciate understanding the mechanics behind the magic. And, of course, "RAG Implementation" is a *big crowd-pleaser* right now. Everyone wants to know how to connect AI to their own data.<sup>1</sup>

Module	Title	Description	Duration
21.	How Language Models Actually Work	Demystifying AI (non-technical)! Transformers and attention mechanisms, tokens and context windows, training and fine-tuning. Why AI sometimes fails.	30-40 minutes
22.	Advanced Prompting	Master-level prompting!	30-35 minutes

	Techniques	Chain-of-Thought, Tree of Thoughts, Few-Shot learning, Role-Based prompting. Meta prompting (using AI to write better prompts).	
23.	Image Generation: Midjourney V7, DALL-E, Flux, Imagen	Create stunning visuals! Midjourney V7 (gold standard), DALL-E 3 in ChatGPT, Flux, Google Imagen 3/4. Prompting for specific styles, commercial use.	30-40 minutes
24.	Video Generation: Veo 3, Runway, Pika	AI-powered video creation! Google Veo 3 (with native audio), Runway ML, Pika Labs. Text-to-video, image-to-video, video editing with AI.	25-30 minutes
25.	Multimodal AI: Text, Image, Audio, Video	Beyond text! GPT-5's multimodal capabilities, analyzing images and documents, audio transcription and generation. Creating comprehensive multimodal workflows.	25-30 minutes

26.	RAG: Retrieval Augmented Generation	Supercharge AI with your data! What is RAG and why it matters. Structuring knowledge bases, chunking strategies, vector databases. When RAG beats fine-tuning.	30-40 minutes
27.	MCP: Model Context Protocol	Connect AI to everything! Understanding MCP (Anthropic's protocol), building MCP servers, connecting Claude to tools and data sources. Google Drive, Slack connectors.	25-35 minutes
28.	AI Coding Basics for Non-Developers	Code without coding! Understanding what code does, reading and modifying scripts, using AI to generate code. ChatGPT Code Interpreter, Claude Code.	30-40 minutes
29.	AI Model Selection & Comparison	Choose the right model! Comparing GPT-5 vs Claude Sonnet 4.5 vs Gemini 2.5 Pro.	20-25 minutes

		Benchmarks and real-world performance. Cost-benefit analysis.	
30.	Evaluation & Testing AI Outputs	Trust but verify! Evaluating AI-generated content for accuracy, bias detection, fact-checking workflows. Creating test cases and rubrics.	20-25 minutes

(Source: <sup>1</sup>)

## Chef's Specialties (Advanced Level)

The Chef's Specialties (our "Advanced" tier) are for the teams ready to build. This is where that "light version" comment from the client becomes so powerful. For a module like "AI Coding Tools," many teams don't need a full-blown coding class. You can offer the "light version" and say, "I won't teach your team *how* to code, but I will show them Cursor, Windsurf, and Replit and how your developers can use them to be 10x faster."<sup>1</sup>

Module	Title	Description	Duration
31.	AI Coding Tools: Cursor, Windsurf, Replit	Next-gen development! Comprehensive comparison of Cursor, Windsurf, Replit, GitHub Copilot. Real-world demos, strengths	35-45 minutes

		and weaknesses.	
32.	Claude Code & Command-Line AI	AI in your terminal! Claude Code deep dive, agentic coding capabilities, checkpoints and version control. VS Code extension, practical uses.	30-40 minutes
33.	Computer Use: Claude's Autonomous Capabilities	AI controlling computers! Anthropic's Computer Use feature, letting AI navigate interfaces, click buttons, fill forms. Claude for Chrome extension. Safety, security.	25-35 minutes
34.	AI Agents: Theory & Practice	Building autonomous systems! What are AI agents? Agent frameworks and architectures. Research agents, data analysis agents, workflow agents. Tool use.	35-45 minutes
35.	Workflow Automation: N8n	Visual automation platform! N8n introduction (German unicorn), building your first workflow. Nodes and connections, AI integration.	40-50 minutes

		Self-hosting vs cloud.	
36.	Make.com & Zapier: No-Code Automation	Automation for everyone! Comparing Make vs Zapier vs N8n. When to use each platform. Building multi-step workflows, connecting apps and services.	30-40 minutes
37.	API Integration Without Coding	Connect anything to everything! Understanding REST APIs, reading API documentation, using Postman. Webhooks and API calls. Building integrations without programming.	30-35 minutes
38.	Custom Actions & Function Calling	Extend AI capabilities! Building Custom Actions for GPTs, function calling in APIs, connecting GPTs to external tools. Creating custom integrations.	30-40 minutes
39.	Building AI-Powered Apps	From idea to production! App architecture with AI, using no-code	40-50 minutes

		platforms (Bubble, Webflow, Glide), integrating AI APIs. Building chatbots, AI tools.	
40.	Advanced Automation Examples	Real-world automation! Automated research and reporting, multi-step workflows, email automation, CRM integration, data processing pipelines. Live demos.	35-45 minutes

(Source: <sup>1</sup>)

## Desserts (Specialized & C-Suite Oriented)

Finally, Desserts. We created this tier specifically for the C-suite. Why? Because the core employees on the ground want the "meat and potatoes"—the hands-on tools and technical workflows. The C-suite, on the other hand, wants the 100,000-foot view. They don't care how N8N or Make.com works; even just *telling them* those platforms exist is often enough information.<sup>1</sup>

They are asking entirely different questions: "Which tool lets our employees go faster? Which one is cheaper at scale? Which has better security? Where can we get a deal?" This tier is designed to answer those high-level, strategic questions.<sup>1</sup>

Module	Title	Description	Duration
41.	AI for Business & Strategy	Strategic AI applications!	30-35 minutes

		Market analysis and opportunity identification, business model development, strategic planning with AI. Scenario planning.	
42.	AI for Investment & Due Diligence	Investment intelligence! Deal flow analysis and screening, automated due diligence, financial modeling and analysis. Market sizing and TAM calculation.	30-40 minutes
43.	AI for HR & Talent Management	Smart HR workflows! Resume screening and candidate evaluation, interview question generation, job description writing. Onboarding automation, Q&A bots.	25-30 minutes
44.	AI for Marketing & Content	Marketing at scale! Content strategy and creation, SEO optimization, email campaigns. Social media management, ad copy generation. Brand voice	25-35 minutes

		consistency.	
45.	AI for Sales & Business Development	Close more deals! Lead qualification and scoring, personalized outreach at scale. Proposal and pitch deck generation. CRM data enrichment. Sales forecasting.	25-30 minutes
46.	AI for Finance & Accounting	Financial intelligence! Report analysis and insights, budgeting and forecasting. Invoice processing automation, expense categorization. Compliance checking.	25-30 minutes
47.	AI for Legal & Compliance	Legal workflows! Contract review and analysis, legal research assistance. Compliance monitoring, policy documentation. Risk assessment.	25-30 minutes
48.	AI for Product Management	Product excellence! User research and insights, feature prioritization, roadmap planning. PRD (Product	25-30 minutes

		Requirements Document) generation.	
49.	AI for Customer Support	Exceptional support at scale! Building support chatbots, ticket triage and routing. Response generation and quality assurance. Knowledge base creation.	25-30 minutes
50.	AI Safety, Ethics & Governance	Responsible AI! Understanding risks and limitations, bias detection and mitigation. Prompt injection and security. Building internal AI policies.	30-35 minutes
51.	AI Literacy for Leadership	Strategic AI leadership! Understanding AI's business impact, building AI strategy, evaluating AI vendors and solutions. Change management for AI adoption.	30-40 minutes
52.	Building an AI-First Culture	Organizational transformation! AI adoption strategies, training programs, centers of excellence.	30-35 minutes

		Measuring AI maturity, overcoming resistance.	
53.	Future of AI: 2025-2027 Trends	What's next? Emerging capabilities and model releases, multiagent systems, AI hardware and edge AI. Predictions for business impact. AGI discussions.	25-30 minutes
54.	Building Your Personal AI Stack	Your AI toolkit! Choosing the right combination of tools, building workflows that work for you. Managing subscriptions and costs. Continuous learning strategies.	20-25 minutes
55.	Advanced Custom GPT Development	GPT mastery! Advanced instructions and knowledge files, building GPT ecosystems. Monetization strategies (GPT Store), troubleshooting and optimization.	30-40 minutes

(Source: <sup>1</sup>)

This menu structure isn't arbitrary. It's the client-facing artifact of the internal "Three-Tier Strategy Framework" we discussed in Day 1.<sup>1</sup> "Appetizers" and "Soups" are the perfect embodiment of "Tier 3 - Education." "Main Courses" and "Chef's Specialties" are how you deliver "Tier 1 - Implementation" training. And "Desserts" are a high-level version of "Tier 2 - Prep & Strategy" for leadership. It translates your internal playbook into a language the client can understand and, most importantly, buy.

## The Upsell: From À La Carte to Pre-Packaged "Banquets"

A 55-item menu is amazing for signaling expertise, but it can also create a "paradox of choice." Some clients don't want to pick 15 different items; they are overwhelmed and just want you to give them the solution.

For them, we offer "Banquet Options".<sup>1</sup>

This is a highly effective way to upsell. You can pre-package the lectures you really enjoy giving and have already crystallized in your mind, which means your prep time is significantly less.<sup>1</sup> You create pre-designed "feasts" for common needs.<sup>1</sup>

Our Banquet Options look like this:

- **Banquet A:** Foundation Package
- **Banquet B:** Technical Implementation Package
- **Banquet C:** Leadership Strategy Package
- **Banquet D:** Full Transformation Package
- **Banquet E:** Custom Tailored (where they get to pick) <sup>1</sup>

But the real magic isn't just the package; it's what you include. This is where you build the bridge to your next contract.

### Included with Every Banquet:

- Template library
- Custom GPT setup guides
- Workflow automation templates
- **30-day post-workshop email support** <sup>1</sup>

Pay very close attention to that last item. The "30-day post-workshop email support" is your secret weapon. This is your entry point to offer a small retainer or a big retainer. The workshop is just the (paid) lead magnet. The 30 days of support is effectively a *paid trial* for your

"expert-on-tap" retainer service.

When the 30 days are up, the client is already used to having you in their corner. The transition to a \$500/month or \$2,000/month retainer becomes a natural continuation of the value you're already providing, not a hard, awkward upsell.<sup>1</sup>

## The "Chef's Secret": A Formatting Hack to Look Pro

So, you've got your 55-item menu. How do you *present* it? You could use a tool like Gamma, but as we've discussed, that can often look a bit... AI-generated. For a Fortune 500 client, you want a document that looks professional, serious, and custom-built.<sup>1</sup>

Here's the cheat code: We use Claude to auto-format a professional Docx menu.

Let me be clear: **ChatGPT can't do this level of Docx formatting yet.**<sup>1</sup> This is, for now, a Claude-specific hack.

Here is the step-by-step process:

1. **Enable the Prerequisite:** First, you have to enable a setting in Claude. Go to **Settings → Capabilities** and turn on the toggle for "**Code execution and file creation.**" This is the prerequisite that allows Claude to create and manipulate high-fidelity Docx files.<sup>1</sup>
2. **Upload a Template:** Upload a basic Docx template. (We've attached our "AI Workshop Chinese Menu.pdf" to this post for you to reference).<sup>1</sup>
3. **Use the Magic Prompt:** Ask Claude to customize it. I did *none* of the formatting on our "AI Workshop Menu 2025" myself. I simply asked Claude to do the work. A prompt I've used for this is: "**Do deep research on latest and greatest topics in AI. Supplement with my old workshop lectures. Create Chinese menu format.**".<sup>1</sup>

This prompt does more than just format; it *co-creates the menu with you* by blending new, "deep research" on the latest topics with your existing IP ("old workshop lectures"). You can generate your entire 55-item menu from scratch in a fraction of the time.

Finally, add the professional touches that tie it all together.

- **Delivery Details:** Make sure you include a "Workshop Details" section at the top. Specify things like "Mix & Match: Choose any combination...", "Duration: 2-2.5 hours per session," and "Format: Remote or on-site".<sup>1</sup>
- **The "Freshness" Footer:** This is a playful but crucial part. At the bottom of the menu, add a message like: "**Serving fresh AI knowledge updated for October 2025. Things**

**will change, tools will change, models will change.".<sup>1</sup>**

That footer is not just a cute sign-off. It's a strategic sales message. First, it creates urgency by signaling the knowledge is "fresh." Second, it builds in *planned obsolescence*. By explicitly dating the menu, you are telling the client this knowledge *will* expire, which creates the need for them to hire you *again* next year to stay current. It's the perfect, non-aggressive setup for a long-term retainer.

## Making the Menu Your Own (The Ethos)

You can, and should, take this template and apply it to whatever it is you're trying to offer. The magic isn't the specific items; it's the categorization and the psychology.<sup>1</sup>

For example, if you do automation consulting:

- **Appetizers:** Basic n8n/Make workflows.
- **Soups:** Quick automation wins.<sup>1</sup>

...and so on.

This is the whole point. You're giving your prospective clients a way to see, at a glance, that you know what you're doing. It makes the back-and-forth so much easier. You're no longer having a full-length, high-friction conversation with the chef every time you go to a restaurant. You just give them the menu, and they pick what they want.<sup>1</sup>

### Works cited

1. Consulting Playbook Day 8\_The Chinese Menu Technique.txt