



## Checklist 3 - Defining The Services Of Your Firm

Project Name: \_\_\_\_\_ Date: \_\_\_\_\_

Yes No

*Defining the services of your consulting firm allows you to differentiate yourself from other consultants in the market. To succeed as a consultant, it is essential to define your services and deliverables to help clients understand what you are offering. This checklist provides a guide on how to define the services of your firm:*

### Part 1 – Specifying The Products And Services

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Start by brainstorming the general products and services you would like to offer. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Narrow down to specific products and services based on your expertise.            | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Articulate your specific products and services to your clients.                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Organize your products and services into clear cut packages.                      | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

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- 5 Develop a pricing strategy for the different packages.

### Part 2 – The Consulting Structure

- 6 Determine whether the business will provide solutions or observations.

- 7 Decide whether your consulting firm will be troubleshooting or providing recommendations.

- 8 Decide whether or not you will conduct workshops.

- 9 Determine whether the workshops will be conducted locally or nationally.

### Part 3 – Choosing A Name For Your Consulting Firm

- 10 Build the firm's name around key attributes of your business.

*Notes*

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11 Focus on a memorable and personable name for your firm.

12 Ensure the selected name is unique with positive connotations.

13 Check to see whether the selected name is used or trademarked.

### Part 4 – Develop A Brand Identity

14 Develop a unified look for your brand across platforms.

15 Create a unified voice for your brand in all marketing platforms.

16 Establish your brand as an expert in the industry.

17 Integrate your online presence with your professional presence.

*Notes*



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18

Leverage your abilities and experience.

 

19

Ensure your brand maintains relevance and consistence.

 

*Notes*