

Million Dollar Consulting™ Toolkit

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*Step-by-Step Guidance, Checklists,
Templates, and Samples from
The Million Dollar Consultant*

Alan Weiss, PhD



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John Wiley & Sons, Inc.

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

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ISBN-13 978-0-471-74027-8 (pbk.)

ISBN-10 0-471-74027-6 (pbk.)

Printed in the United States of America.

10 9 8 7 6 5 4 3 2 1

For Koufax
the white German Shepherd Dog and Buddy Beagle,
more formally Sanford von Koufax of Ebbets
and Buddy Beagle of Las Brisas,
who embrace me in their unending joie de vivre.

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— ACKNOWLEDGMENTS —

My gratitude to all of those people who have participated in my Private Roster Mentor Program since its inception in 1996. As in any pursuit, you learn more as the teacher than as the student, and their grand array of professional and personal challenges, as well as their trust in and candor with me, have enabled me to constantly hone my craft and build my skills.

Sincere appreciation to my agent, Jeff Herman, who has placed a half-dozen of my books, including my two best sellers.

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INTRODUCTION

During my 20-year career as a solo practitioner who works with major organizations, consulting firms, and other solo practitioners, I've been asked two questions far more than any others: How do I establish value-based fees, and how do I manage my time so that I build a seven-figure practice with no employees and plenty of leisure time?

The first question I've answered in several books and scores of articles and interviews. But the second has never been comprehensively treated until this *Toolkit*.

I've included herein, with my permission for you to appropriate and modify for your purposes (and a web site to visit to download whatever forms you need), checklists, forms, and templates that will save you an enormous amount of time (I estimate more than a month a year) and dramatically enhance your professionalism and productivity. You can read this like a book, or refer to it like a reference manual, or seek out methods to improve still further those areas in which you're already proficient.

There is no particular sequence that's important; the sections are not in any particular order, but instead serve to organize elements within common boundaries. I've tried to provide maximum support with minimum interference. Most elements have a brief narrative explaining the "why," then a checklist, commentary, and one or more templates (where appropriate) to demonstrate the "what" and the "how." The "when," of course, is up to the reader's needs, interests, and, frankly, discipline.

The commentary sections are my biases about what might make the best sense, and I have no financial connection to any of my recommendations (other than perhaps coincidentally owning stock in some of the companies). You needn't follow my specific recommendations, but I think I owe you my best experiences.

My intent is that you use the checklists as appropriate for daily and short-term planning and quality assurance, and use the templates as needed for actual tactical implementation. For example, the templates for creating an article, a follow-up letter, or an invoice can save you hours of time every week.

I stipulate here that you may have some better ideas than I in some of these areas, or can think of additional areas that need treatment (and I urge you to write to me or the publisher so that we may consider these possibilities for future editions), but I believe that there are a dozen or more techniques here that you can use immediately to improve your business and your life. *Hence, the goal is neither all-inclusiveness nor perfection, but merely success.* Select those forms and checklists that improve your approaches, and your success will increase immediately.

Although this is a different type of book for me, that goal of success is a common theme through all of my work. People told me that I could never succeed as an independent consultant, much less make a million dollars and more working out of my home. I didn't believe them, because they had no evidence that I couldn't succeed, and I despise that kind of projected pessimism. They were wrong, *but they would have been right if I hadn't chosen to go my own way.*

I'm here to tell you that you can succeed more than you ever anticipated—more than I have succeeded—if you simply apply those aspects of this book that for you, personally, represent immediate improvement. I'm happy to be on that journey with you, and wish you the same marvelous experiences I've enjoyed in this great profession.

Alan Weiss, PhD
East Greenwich, RI
June, 2005