

# 18 Step Checklist: How to Become a Small Business Consultant

How do you grow your small business consulting practice? What skills do you need?

Here are the 18 steps to becoming a small business consultant. Whether you call yourself a consultant, coach, advisor or mentor, these steps will help you develop skill sets and grow your business.

I've been a small business consultant a long time, and these are the essentials that have worked for me and my clients. I think they'll work for you, too.

## The Coach-Consultant Concept

A **small business consultant** works with clients on strategy, planning, and problem-solving, assisting clients to develop business skills and knowledge. These topics range from designing a business model or marketing plan, to determining which marketing techniques to use and how to use them. You'll often help clients learn how to plan and implement projects. A small business consultant gives advice, teaches skills, and brainstorms with the client to produce practical results and enhance strategic thinking.

When designing your consulting practice, consider if you are 100% a consultant or if you're also a coach, too.

A **small business coach** helps clients to create success by focusing on personal development: time management, self-sabotaging behavior (like procrastination and limiting beliefs), finding clarity, decision making, and getting into action. When you put on your "coaching hat," you don't give advice. Instead, you help the client find the answers from within themselves.

I've been both a full-time coach and a full-time consultant and I have a secret for you:

**You need *both* consulting skills *and* coaching skills in order to be effective and provide real value.**

I have been working with micro business owners and solo entrepreneurs for over 20 years and I rarely find one that doesn't need both coaching *and* consulting.

It's true: they almost never approach me and ask for straight coaching. They ask for consulting. They ask for practical advice and brainstorming. But in the search to find solutions and to map out a strategy, clients will stumble unless they do both the personal development work *and* the business development work that leads to success.

I wrote an ebook for consultants who market their services to small business owners. If you are struggling with your marketing and sales, discover the missing link and solve the mystery of why small business owners aren't buying your consulting services.

[Click here to get a free copy of Discover the Missing Link.](#)



## Checklist for Becoming a Small Business Consultant

Consider all these items/decisions when you are designing your business and marketing models -- whether you are starting a new small business consulting practice or growing your existing one:

1. **Design your business model.** Just like you would help a client with their own business model strategy, go through those same steps and work on your *own* business model design. Things to consider: what legal format you'll use, what are your mission and vision statements, what are your offerings, your pricing, and profit models. Include the resources you will need to succeed, like money, time, skills/knowledge, equipment, and people resources. Set goals and milestones for the next 1 year, 3 years and 5 years. Read my blog post for a complete checklist about [what should be in your business plan](#).
2. **Craft a powerful marketing plan.** There are many small business consultants out there. How will you be remarkable and stand out from the crowd? How will you connect with your audience and build trust? Which of the 100+ available marketing techniques will bring the best results? What are your

marketing goals and how much will you invest to achieve them? Read my blog post about [how to choose the best marketing techniques](#) for your consulting business.

3. **Systematize your business for maximum efficiency.** Time is a precious commodity: you can either use it to run your business or you can use it to work with paying clients. When you use templates, automation and sales scripts, you reduce the time you spend on administrative work. Take time early in the design of your business model to create these systems to free up your time and attention for more important tasks. Hint: Once you master these, you'll then teach these efficiencies to your clients.
4. **Start with your own skill-building.** You cannot be an effective consultant if you don't bring value to the business owner. Be relentless in your ongoing education. You become more in-demand and can charge higher fees based on your wider breadth of knowledge and expertise.
5. **Check your experience level.** It's rare that a small business owner will entrust their business to a small business consultant who has never owned a business before, or to a consultant who doesn't have a high level of expertise in a specific topic area. An expert is defined as having 10,000 hours of experience with the topic they claim as their expertise. If you use a traditional 40-hour workweek as your ruler, that means you need at least 5 years of full-time experience with your small business topic in order to call yourself an expert.
6. **Determine your Big Why.** Before you get down to the nitty-gritty of designing your consulting business and getting clients, figure out why you want to be a small business consultant, and why you want to help these owners. Why this specific target audience? What is your motivation? Knowing this will keep you going when you hit the inevitable speed bumps along the way to building your business and serving your clients.
7. **Determine what "success" looks like for you personally.** Keep your eye on the target. The definition of success differs from person to person. Take some time to visualize all the ways that a successful consulting practice will manifest in your personal and professional life. What exactly will it look like when you have achieved success in your consulting business?
8. **Learn coaching skills.** You will be working with human beings who have their own set of strengths and weaknesses. Learn deep listening skills and how to ask meaningful questions to get clarity and provide focus. Learn how to hold clients accountable for implementing their action plans, and how to deal with

difficult client situations. You'll find that you work as much with the business owner's mindset as you do with the practical logistics of running a business.

9. **Choose a focus or niche.** Determine if your specialty requires you to have a license or certification (financial and tax advisors, legal advisors, insurance advisors). Will you focus on a small topic area, like email marketing strategies, or will you be an expert who can help clients with a wide range of challenges and projects? Will you work with a particular size business based on the number of employees or revenue? Will you work only with local clients, or will your consulting business be national/international?
10. **Decide if you are going to advise them, or do the work for them.** Some consultants are more like mentors and advisors, who work with the small business owner to do planning and strategy work. Other small business consultants provide a specific service as a sub-contractor, to augment the client's staff (such as part-time CFOs, website designers, and copywriters).
11. **Learn the problems that most small business owners have** and formulate a strategy to define and solve those problems. When I work with my Compass Master Program participants, I outline the top 29 problems that my clients commonly need help with. Use readily available strategies, tools and assessments to help solve these problems, or create strategies of your own. Consider putting together your own consultant's toolkit.
12. **Deeply understand the seven areas of a business model** to help your clients in the areas that are causing the most damage or have the best return on investment if they make a change.
13. **Get help with the administrative and marketing work.** Outsource the tasks that you do not want to do, that you are not an expert in, or that take away from your revenue-generating time.
14. **Get your ego out of the way.** While your work can and should be meaningful to you, you are not a consultant to pump up your own ego. You are a consultant to serve your clients. You are going to advise them, help them to determine the pros and cons of each course of action, and then allow them to make their own decisions. You cannot stop them from making unwise decisions or from not following through on an implementation plan. Equally, if your client has a big win, it may be partly due to your advice, but much of the praise needs to go to your client for making it happen. Decide in advance what a "successful client engagement" means to you.

15. **Be honest about your own areas of personal development.** No one is perfect. Sometimes we procrastinate. Sometimes we get distracted. Sometimes we let anger or fear get the better of us. Sometimes we don't communicate as well as we could. Discover your weaknesses and either learn how to overcome them, or hire staff to help deflect them.
16. **Choose marketing techniques that bring qualified leads to the sales conversation.** Track your marketing relentlessly. If your marketing isn't bringing the desired results, revamp it. Do not choose marketing techniques because they are a hot trend if they don't bring in leads or help build your brand recognition.
17. Learn problem-solving, **decision making, project management, and time management skills.** These four skills will provide the backbone of the assistance you will offer clients and help you run your own business successfully.
18. **Learn from the masters.** Why reinvent the wheel? You can discover savvy shortcuts by paying attention to the leading consultants in your industry. In any small business consulting niche there are always several people who have risen to the top of their profession. Study their offerings, their marketing methods, the way they run their businesses, and the way they work with clients. Determine if those methods would serve you and your clients, too.

I've been helping small business owners since 1996 to grow their businesses and get the outcomes they want. I teach my techniques to other small business coach-consultants to help shorten the learning curve and create an effective and efficient consulting business for yourself.

If you'd like to discuss how I can help you with your business and marketing strategy, reach out to me at [office@passionforbusiness.com](mailto:office@passionforbusiness.com) or in the USA (610) 381-4332.

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