

# Consulting Blueprint

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A strategic guide with proven principles on how to get clients, productize your offerings and build a highly profitable consulting business

# Contents

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**Chapter 1** **2**

How to Get More Ideal  
Consulting Clients

---

**Chapter 2** **10**

Productization: How to Bust the  
“Consultant Bottleneck” and Finally  
Scale Your Business, the Easy Way

---

**Chapter 3** **20**

How to Price Your Consulting Services to Add  
More Revenue, Save You More Time, and Scale  
Your Business without Driving Yourself Crazy

---

**Chapter 4** **27**

Scaling Your Consulting Business  
To \$1 Million and Beyond

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**Chapter 5** **39**

Our 7 Guiding Principles—  
Why We Do What We Do

# Chapter 1

## How to Get More *Ideal* Consulting Clients

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One of the greatest ad copywriters, Gary Bencivenga, once said that there were 4 keys to selling anything.

1. An Urgent Problem
2. Unquestionable Proof
3. Unique Promise
4. User-friendly Proposition.

And, this genius marketer claimed, the most important of the four...by far... is **PROOF**.

If you have powerful, eye-popping, compelling proof, you almost don't need the other three. Powerful unquestionable proof does the heavy lifting in any sales situation.

So, I'm going to do something a little different here. Rather than jump in a with a bunch of tips and tricks for selling more of your consulting services.

**I'm going to start by proving that what we teach works.**

How am I going to do that?

Well, rather than lecture you about what steps to take, I'm going to show you the steps that a couple of our clients took. Steps that netted them lots more clients and lots more revenue.

I'm going to give you the proof...then I'm going to show you the principles they used. And how you can use them too to bring in more clients and more revenue.

Are you with me?

OK. Here's the first proof story from one of our clients...

# Consulting Success Story:

## Elliot Begoun

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Elliot spent many years in the corporate world before finally setting out on his own. His biggest fear was losing the security of working for a corporation. After all, the corporation provided the clients for him. If he went out on his own, would he be able to “fish for his own food”?

Eventually, with his wife’s encouragement, he realized there was way more security in betting on himself than betting on someone else. Even if that someone else was a big, safe corporation.

And boy did Elliot learn to fish for himself. Here’s one example of the success Elliot has had reeling in the trophy marlins...

“The first thing I did was start writing about the topics that I felt my clients would want to hear about.

As I’ve narrowed my focus, I’ve narrowed my writing, so it’s very specific to the people I’m trying to talk to.

The other thing that I did then was begin to look at where are those ideal clients getting their information, what are they reading, those types of things.

Then I started reaching out.

One of my early blog posts that I also posted on LinkedIn wound up getting read by well over 30,000 people!

The editor of the Huffington Post reached out to me. I had no idea how to do a pitch or anything along those lines.

That forced me to have that conversation and learn.

It also gave me an initial platform for some credibility, although quite frankly, the Huffington Post has not been very effective for lead generation.

The trade publications, the specific earmarked publications, have been far more effective in both thought leadership and lead generation.

Once I did that, I realized everyone is starving for content.

If I'm delivering content that's valuable to my ideal client, and it's the same ideal client that the publication has, we're already aligned. It's not like we're working in opposite spheres of influence.

I started reaching out to editors, and instead of pitching to them, saying, "Here's an article. Would you publish it?"

I started asking them, "What do you feel is missing in your content? Where are you struggling in finding content? Would it be helpful if I wrote an article on that for you?"

Just engaging them in that conversation is what really took off.

The other thing that came up was this concept of doing an interview series and reaching out to ideal clients.

If it's an emerging food brand, I'm talking to young founders but I'm also talking to CEOs of multinational companies and comparing the similarities and dissimilarities.

I went back to the editors and said, "Here's an idea that I have. What do you think?" And they were all for it.

That gave me an entry point to reach my ideal clients. I can say, "I want to write about your story. I want to feature your story in Food Dive or Smart Brief or even the Huffington Post. Can we have a conversation?"

Most people will say, "Let's have a conversation."

During that interview, if there's an intersect, if there is an opportunity where I can help them, since we've already built a relationship... We've been sharing a relatively deep conversation, so it's very easy for me to say, "That's something I do in my practice. Why don't we spend a couple of minutes after the interview to explore that together and see if I can offer any help."

It's turned into not only clients, but also a great referral source. These larger companies know me, I can reach out to them and ask them for help or pointers or connections. It's just been a really powerful tool."

Wow! There are so many great lessons for generating more clients in Elliot's story.

## Let's take a look at a few...

**1.** First, Elliot understood the **Power of being seen as an Authority** in his industry. Remember what I said about "proof" being the most important element in any sales situation?

If you're viewed as authority in the industry, that's one of the most powerful forms of proof you can possess.

And writing blogs, articles, reports, guides, checklists, eBooks and real

"3D" Amazon books are a fantastic way to prove your knowledge and authority.

Many people think real books are being replaced by digital books in the 21st century. That may be the case. But if you have a real book on Amazon, with lots of great reviews, you have something that most consultants do not have. You're unique. Unique is always an advantage. Personally, I believe the old adage is still true, "a book is the greatest business card you can have." That's why I've written 3 books so far.

And if you think writing a book is a massive undertaking...then pay attention to the next lesson from Elliot's story...

**2. Elliot started small and adjusted.** He just started writing about what he knew. And then, as he published, as he asked questions of more clients, as he had more conversations with prospects, as he got more feedback from editors...he adjusted.

But you can't get feedback if you don't start. A consultant friend of mine likes to say, "You can't steer a parked car!" You have to start driving. Just do it, as Nike says. And as you write, a little every day, you'll adjust, hone, craft, and perfect your message. And eventually, you'll have the raw material for a book.

Think of it as making small daily deposits in the bank. After one day you won't have much. After 10 days you won't have much. But after 365 days you might very well have enough for two or three books!

Plus, you'll have generated content you can publish as blogs, articles, checklists and other lead generation giveaways.

**3. Elliot really focused on his “ideal” clients.** As he wrote, talked, asked, and conversed with people in his industry, his “target” audience got SMALLER not larger. This is probably the most important lesson from Elliot’s story. We shared this with Elliot and it’s something we teach all our clients in our coaching programs.

You might be thinking, “Why would I want my target audience of ideal clients to get smaller? Isn’t it better to have a broader, bigger audience to pull from?”

No. 1000 times no.

If you do that, you’ll lack clarity on who your ideal client is. Or, you’ll target the wrong ideal client. **This is so important, it really is the first step I teach and confirm with clients in our [Clarity coaching program](#).**

I call this process “Ideal Client Discovery.”

All of your marketing – your value proposition and marketing messaging – will be based on this. So, it’s critical that you have your REAL ideal client in sight if you want to get more consulting clients.

In fact, the more focused you are on who your ideal client is, the better.

You should be able to identify exactly...who your ideal client is

- What their title is
- Their industry
- Their location
- The frustrations, desires, and barriers they are facing in their business

Knowing this allows you to target your messaging and marketing specifically to them.

Without ideal client clarity, you cannot identify your target clients. If everyone is a potential client, then nobody is.

## Try these exercises:

**A.** Imagine you're a management consultant and you serve any type of client. You work with all types of businesses on all types of problems. Now go and build a list of 100 ideal clients.

**B.** Imagine you're a marketing consultant and you serve VPs of marketing at U.S based fintech startups who are looking to generate more leads for their sales team. Now go and build a list of 100 ideal clients.

In the first exercise, there is no direction. How do you build a list of clients when anybody could be your client? Who should you be looking for? What should you be writing? How can you market yourself to everyone at the same time?

You can't. And that's why focus is critical for your marketing.

You'll find the second exercise is much, much easier.

Why?

Because in the second example, you know who you're aiming for. You have direction.

Because you know you're going after fintech startups in the United States, it's easy for you to look for fintech companies — and then, find their VPs of marketing.

And, as in Elliot's story, it's often an evolving, organic process. As you write, ask questions, and have conversations, you learn more about who your ideal clients should be.

The more he laser-focused on a small number of potential clients, the more his message resonated with them.

Very few marketers can appeal to a broad market. The ones that can are MASSIVE corporations: Amazon. Walmart, Facebook. And I think we can agree, that you and I, and all consultants, are not Amazon. Not even close.

So, the rest of us have to make sure our marketing appeals are highly focused on a small niche who wants exactly what we have to offer. Like Elliot did.

Notice that Elliot's biggest "win," (an article he wrote that got picked up by Huffington Post and seen by over 30,000 people) was not effective in generating clients. But the small, tightly-focused articles in niche industry publications were very effective!

#### **4. Elliot understood the value of asking questions and having conversations.**

This might sound simplistic. It is not. Most consultants don't ask enough questions. Most consultants lecture and preach. They tell prospects, "Here is the problem you have." Then they tell prospects, "I'm skilled at fixing those problems."

Without ever finding out if the prospect is concerned about that problem!

This is another strategy we teach the [consultants we coach](#) and in [Momentum, our program for early-stage consultants](#). *How to have meaningful conversations, that lead to more meaningful conversations, that lead to sales.* We teach our students how to know when they've asked the right questions and asked enough questions.

If you don't approach selling your services as a questioning and conversation process, you'll always be seen as a commodity, or even a nuisance. Not a trusted, welcome advisor.

And speaking of ingenious ways of creating conversations...

#### **5. Elliot created a "conversation platform" that attracted his ideal clients.**

This is high-level, ninja consulting stuff we shared with Elliot in our coaching program.

Most consultants think that the best way to get clients is to beg for appointments, pitch their services, and then...wait and hope.

But savvy consultants know the power of a **platform**: Inviting ideal clients on a radio show, interview series for a print newsletter, or podcast directed at the industry.

This not only sets you up as an authority, it eliminates the sales resistance you face with the appointment/pitch/wait method. It's a conversation not a sales pitch!

What's the bottom line?

Well, Elliott tried to do it on his own at first, and says, "I wasn't connecting the dots. But after starting to work with the Consulting Success program, and having a system... revenue started flowing and it hasn't stopped since." Elliott's initial goal when starting his consulting practice was a to replace his corporate salary in two years. "I did it in less than six months."

## What's Your Next Step for Landing More Clients Fast?

**1.** If you're considering starting your own consulting practice or if you're in the early stages of growing your practice, our Momentum Coaching Program is the best place to start.

In Momentum we show you how to add 6 figures to your consulting revenue with one hour a day without uncomfortable cold calls or spammy emails. Without chasing Facebook, Twitter or social media "shiny objects" Without complicated and expensive software or website redesigns. And without maxing out your credit cards to pay for it. [Get full details on Momentum here](#)

**2.** If you're a more experienced consultant and you're looking to scale your practice, without adding hours of work to your already-packed week, then our Clarity Coaching Program is the best place to start

In Clarity, we show you how to develop a predictable pipeline of clients and take your consulting business to the next level fast.

Over 300 consultants from around the world have fixed their lead flow in 8 weeks. We have tested and developed a series of simple steps that support rapid learning and implementation to help you grow fast. [Learn more about Clarity Coaching](#)

When your marketing is effective, sales is easy. Clients come to you.

And our coaching programs are specifically for consultants like you who struggle with their marketing and want a consistent, steady stream of profitable consulting business.

# Chapter 2

## Productization: How to Bust the “Consultant Bottleneck” and Finally Scale Your Business, the Easy Way

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Does Josh’s story sound like your story?

Josh, a marketing consultant, filled out an application for our Clarity Coaching Program.

Where we asked, “What do you feel is holding you back from achieving your revenue goals?” Here’s what he said...

*“A couple of things are holding me back.*

*First, I spend so much time working IN my business (client project work) that I don’t have enough time to work ON my business (marketing to get more clients).*

*In fact, I’m AFRAID to add more clients, because that would mean more work. And I don’t have enough time as it is!*

*Second, I would love to do more consulting and less project work. I’d rather tell people what to do than do it myself! But I have so much project work to do that I don’t have time to sell more consulting services.”*

Josh’s situation is not unique. In fact, Sam and I hear a version of Josh’s lament from just about every experienced consultant we talk with! And, because you’re reading this Blueprint, it’s a safe bet you have some version of Josh’s problem too.

Here are Josh’s problems (are they yours too?)...

1. Josh offers customized services to his clients. Every engagement starts with a conversation where Josh dives into the details of his client’s business. Then he crafts a customized plan for his client. Then he executes that customized plan.
2. Because of this customization, every project requires a **lengthy ramp up or learning curve**.

3. Because of this customization, **every project proposal takes a long time to complete.**
4. Because of the time and effort involved in each project, Josh is getting **burned out.** He's liking his job less and less every day. When he went out on his own, he had big dreams of vacationing more with his wife and kids. Five years on his kids are starting to forget his name!
5. Because of the time and effort involved Josh has **no time to market his services.** In fact, he's even a little afraid of landing new clients because "How will I have time to do the work for them!"

### **This is an unscalable and unsellable business.**

Josh cannot grow his consulting business because it has a scale-proof bottleneck.

**That bottleneck is Josh.** There is a limit to the number of customized consulting projects that can be squeezed through the "Josh bottleneck" before that bottleneck breaks down and the whole machine sputters to a wheezing halt.

Of course, Josh could take on partners to spread out the work, but then he'd also have to spread out the revenue!

Of course, Josh could raise his fees, and that would alleviate some of the pressure. But then he'd lose clients to his competition.

What's the answer to this dilemma that every good consultant eventually faces?

Well, there are a few good solutions to the "consultant bottleneck" problem, but I want to talk about one of my favorites. One that we recommend to all the consultants who go through our [coaching programs](#). One that we teach in detail.

Productization.

What is Productization?

Well, it's based on one of the most powerful business concepts in the universe.

The 80/20 Principle.

The 80/20 Principle is so well-known that I probably don't have to explain it, but I'll give a quick definition here...

The 80/20 Principle says that 20 percent of your inputs generate 80 percent of your outputs.

If you look at your average work day, for example, you'll see that 20% of your work generates 80% of your income.

In almost every sales team, 20% of the sales people, generate 80% of the sales.

So, what does this have to do with solving the "consultant bottleneck" problem.

Everything.

**Productization is all about identifying the 20% of your services or processes that solve 80% of the problems your clients hire you to solve.**

Then you create a simple "product" that offers those—and **ONLY those**—services or processes.

For example, Josh notices that 92% of his prospects want him to help them improve the conversions on the back end of their sales funnel. And most of them don't know the metrics for their sales funnel.

So, Josh creates a "Sales Funnel Audit" that he sells for \$2500. He promises to give them a report outlining exactly where their sales funnel needs improvement and exactly what they need to do to fix it.

He sells this Sales Funnel Audit as a product.

He has **productized** one aspect of his consulting business.

Now, I can hear you objecting, "But Michael, I charge way more than \$2500 for my services. I can't pay my bills on \$2500!"

Of course not. But let's look at how Josh's productization helps his business grow.

- 1. It makes the FIRST sale much easier and faster.** There's no negotiation. No lengthy legal contracts. No drawn-out analysis and fact-finding before the initial sale. **Josh can attract new clients MUCH faster** with a product like this.
- 2. It allows Josh to determine if a prospect is a good candidate for higher-priced consulting services later on.** And get paid for doing it!
- 3. It allows Josh to earn good money for less work.** Doing these sales funnel audits for clients takes far less effort than the intensive writing he does for his custom clients.
- 4. It buys Josh time.** The most important commodity of all!

5. It sets Josh up to **more easily close contracts for high-value consulting**. Once a client has paid you money, and seen you demonstrate your expertise, they are much more likely to invest more with you and at higher levels.
6. This is not the end. Josh can now turn to other aspects of his skill set and expertise and productize those and market those. **(And now he has the time to do it rather than just wish he could do it!)**
7. It allows Josh to **DISQUALIFY potentially bad clients before engaging deeply with them**.

Do not underestimate the importance of this benefit! I'm of the firm belief that disqualifying BAD clients is almost as important as attracting GOOD clients.

Here's why: BAD clients can keep you from finding GOOD clients. They suck up your time and money and SOUL. You're so busy dealing with them that you have no time to find BETTER clients. It's consulting hell.

Josh's audit allows him to identify these BAD clients during the "courting" phase before entering a disastrous "marriage."

8. Finally, Josh **enjoys his work more** because he's doing more consulting and less project work. And isn't that what it's all about? Enjoying your work more?

But there are still more benefits of productization that you might not have thought of.

Here's a story from one of our clients to show you what I mean...

# Consulting Success Story

## Mike Gammarino

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Mike Gammarino has seen more clients come on board since he productized some of his consulting services. I asked him what about productization appealed to him most...

We typically go from large project to large project. And while those are great, the revenue coming in from them can be sporadic. We wanted to add some consistency to our revenue stream.

So, we developed some products around key problems that we see our customers face. Then we use these smaller sales as stepping stones to larger projects.

If we can get in with one of these products, we can use them to essentially monitor their business. When we start to see things change, we can up-sell higher levels of service. It dovetails nicely into additional work at a higher margin.

There's a trade-off there, but there's also risk reward. The recurring revenue base allows me to know that my business is a going concern. That month-to-month expenses are covered.

So, I can actually take bigger risks and not feel desperate when I'm trying to land those bigger projects. I can take bigger swings because if that swing doesn't pan out, we're okay. And I can go try to hit another home run with somebody else. But when you're just looking at those all-or-nothing big engagements, it's a little scary if it doesn't work out.

As Mike has worked through this process and the Clarity Coaching system here at Consulting Success his pipeline of business has grown exponentially. Let's look at some lessons from Mike's productization success...

1. If you can productize some of your services and make them **recurring**, you're really onto something powerful. Because Mike knows that he's got his monthly "nut" covered, he can afford to spend time working ON his business (marketing his services and swinging big on potentially huge contracts)
2. Productization, done right, can get you inside your customer's business. You can monitor it and look for more profitable opportunities to be of service.

Take a moment and compare how productization compares to the average feast-or-famine strategy employed by most consultants.

Can you see how much time it saves you?

Can you see how much leverage it gives you?

Take some time now and jot down some ideas for how you can productize some of your services.

And as you do, here are some more helpful tips.

1. Productization is a **removal process**. One of the most important questions you can ask is "What can I remove from my offering and still provide 80% of the value?"
2. Productization starts with the **customer's problem**. Don't ask "What problems can I solve for my customers?" Instead ask, "What problems are my customers ALREADY paying me to solve most often?"
3. Productization for the CONSULTANT is about quick processes, simple steps, easily repeatable systems.
4. Productization for the CLIENT is about **specific, concrete, tangible outcomes**. You are selling an **output**.
5. Productization is not about what you can do, it's about **what your client will want to buy**.

Let's dive into that last one because it's REALLY important.

## How to Validate Your Concept (And How NOT To)

Back in my early days, Sam and I invested \$21,000 in a productization idea. We were developing an online community for marketing professionals.

We spent lots of time and money thinking about every feature our customer would want.

But we never ASKED them what they wanted!

When we launched it, we found out they only wanted about 10% of what we'd built.

Luckily, we were able to pivot, make some changes, and turn it into a profitable business that we later sold. But the lesson stuck with me: **validate before you build.**

We knew that we had the expertise to deliver on this idea. We knew we had the chops. We knew it was something that would help our clients immensely.

But that didn't matter. Because our prospects didn't care what we could do. They had other problems to fix. And they didn't want to hear about our awesome product because **it didn't fit the story they were living.**

"That's nice. Maybe next year. Don't call us, we'll call you."

Don't listen to the voice in the Field of Dreams. Just because you build it, does NOT mean they will come.

So, we spent all of this money creating this awesome product...but most of our market didn't really care about what we were building.

Because we didn't talk to them first. We didn't get feedback and input until AFTER we developed it.

Big mistake. Big, expensive mistake.

And it's a very common mistake for consultants trying to scale through productization.

"I'm so good at this, of course people will want to buy it!"

No, they won't.

## How do you validate your productization concept before wasting time and money on it?

Well, we spend a lot of time on that topic with our clients.

We have a whole training about productization for consultants in [Momentum](#) and we take our clients through this step-by-step in our [Clarity Coaching program](#).

### Here are some quick tips...

1. Through whatever message you can (social media, email messages, current clients, industry peers) ask...

*"Here is what I'm thinking of building. Does it sound like something you'd want? If not, why not?"*

2. Listen to how they respond. Notice the EXACT language they use.
3. Revise your offering based on what they tell you, using their exact language.
4. Repeat

Here's a sample email script you can use to set up meetings with ideal clients and validate your offer:

*Hi NAME,*

*I'm speaking with leaders in INDUSTRY about TOPIC and would like to feature you as well.*

*You have a pretty amazing track-record in INDUSTRY.*

*Do you have 10 minutes tomorrow morning or afternoon that I can give you a quick call?*

It's a win-win scenario. Both parties gain value.

Luckily for you, you don't have to spend \$21K to learn the lesson like we did. If you go [our programs](#), you'll see how to validate before going to market and make sure you're offering something that your clients want.

One last tip that I got from my friend Dave, one of the smartest marketers I know.

After you believe you've validated your concept, ask some potential prospects...

**“I’m planning on selling this for \$XXXX.**

**If I offered it to your right now in “beta” at half price, would you write me a check?”**

If you can’t get anyone to say “Yes” and pay you real money for it, even at half price...you have more validation work to do!

One Last Word on the Awesome Power of Productization

The more you productize your business, the easier it will be to sell it.

Most consulting businesses are nearly impossible to sell.

Why? Because of all the reasons we mentioned at the beginning of this chapter. Who would want to buy a business if all they’re getting is a bunch of hard work to do? Nobody wants to buy something where there is no revenue unless you go out and do hard work!

The more you productize your business the more attractive it looks to a buyer. If the buyer looks and sees there are systems and simple processes in place, it’s more valuable to them. If a buyer looks and sees recurring revenue coming in each month “while they sleep” that’s VERY valuable to them.

“But Michael, I don’t want to ever sell my business.”

That’s fine. But some of the best advice I ever heard was, “Even if you don’t intend to sell your business, you should design it AS IF you were going to sell it someday.”

*“If your business depends on you, you don’t own a business—you have a job. And it’s the worst job in the world because you’re working for a lunatic!”*

—**Michael E. Gerber,**  
*The E-Myth Revisited: Why Most Small Businesses Don’t Work and What to Do About It*

## What's Your Next Step for Boosting Your Revenue with Productization?

If you're serious about scaling up your business and creating a productized offer that weaves seamlessly into your core offerings, our consulting programs are for you.

In our programs we'll teach you how to...

- Market and sell your productized offer with confidence, helping you win new business faster and more profitably
- Automate and systematize parts of your productized offer using so you can earn more while doing less work
- Model your own productized offer ideas after existing successful offers — and connect with the consultants also in our coaching community who offer them

**If you're an early-stage consultant looking to land your first few clients, our Momentum Program** is the right place to start. [See details on Momentum](#)

**If you've been a consultant for some time and want to take your business to the next level, grow not only your revenues BUT more importantly your profit, make a greater impact and create more leverage without tons of extra work, then our Clarity Coaching Program** is for you. [Apply for Clarity Coaching](#)

# Chapter 3

## How to Price Your Consulting Services to Add More Revenue, Save You More Time, and Scale Your Business without Driving Yourself Crazy

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### How the Roller coaster Can Kill Your Consulting Business

George joined one of our coaching programs a few years ago. And on our very first call, I asked him,

“George, what do you see as the main obstacle holding you back from doubling your consulting revenue in the next 12 months?”

See if you nod your head as you read his response...

“Michael, the main thing holding me back is the roller coaster. For a few months I’m flush with cash because a client just paid me a big fee. I’m cranking out work for them. I’m so ‘inside the box’ of my business that I might as well be an Amazon shipment on a UPS truck. I’m so busy working for the client or clients that I’ve got no time for anything else. I’m riding up the roller coaster track. Click. Click. Click.” Then, the project comes to an end...and so does the money. Suddenly I’m scrambling around looking for new clients. I’m emailing, I’m networking, I’m making cold phone calls, I’m calling up old clients begging for new work. I’m sure they can smell the desperation on me even over the phone! Meanwhile, the money is running out fast. I’m checking my bank balances and biting my fingers and maxing out credit cards. I’m in free-fall, zooming downhill on the roller coaster, hoping I don’t crash at the bottom.

“Then, I finally land a new client and the roller coaster starts clicking back up the track again. And the whole ride starts over again. Grueling work followed by desperate scrambling, followed by grueling work...

“And I don’t see anyway off the coaster. I don’t see anyway to really scale my business since I’m either locked inside the box...or scrambling and desperate!”

George’s predicament is not unique. In fact, I can probably count on two hands the number of consultants I’ve coached who did NOT have this problem.

So, is it “just the way it is” when you’re a consultant?

Well, as you’ve seen from what I’ve shared with you to this point, it doesn’t have to be.

There are ways to add new clients and scale your business that don’t all require you to add even more hours of back breaking work.

And in this section, we’re going to explore one other angle for “getting off the roller coaster.

“Specifically, **changing the when, why, and how much you get paid** in order to add stability, slack, and scalability into your business.

Marketer Dan Kennedy used to say that his first piece of advice to every business he ever consulted for was

**“Raise your prices.”**

And it might sound overly simple, but there’s much wisdom in that statement.

There are very few business problems that cannot be solved by raising your prices. More money for the same amount of work has this magical way of erasing most business problems!

**If you can get your clients to pay the higher prices.**

Ah, there’s the rub, as Hamlet said.

So, in this section we’ll show you several ways to raise your prices ...without adding extra work for you...and still get your clients to pay those higher prices.

Now, when I say “raise your prices” I’m not simply talking about raising your fees. In fact, I’m not really talking about that at all. Although simply raising your fees probably would result in higher revenue for less work. It would probably help you attract a higher-value, lower-maintenance client, and repel lower-value, high-stress clients.

What you gain by raising your prices almost always outweighs what you lose.

Higher prices are indeed magical in that way. Most consultants just don’t have the guts to do it.

But that’s not what this section is about.

There are subtle and powerful ways to “raise your prices” with ...

- Retainers
- Pay for performance agreements
- Equity deals

In this chapter we’ll look at all of them, show you when to use them, and how to “sell” them to your clients.

But first, let’s look at George’s complaint and identify the costs of not “raising your prices” with these strategies...

- 1. The Anxiety Cost.** Being your own boss has many advantages. But it also comes with anxiety. When you don’t have the bi-monthly salary check being direct-deposited in your account by an employer, it can feel pretty scary.

The roller coaster, boom/bust cycle described by George can be stressful and shave years off your life. Retainers can add predictable, recurring revenue to ease the anxiety of “feast or famine.”

- 2. The Cost of Un-scale-ability.** George was either cranking away at client work or scrambling to find new clients. So he had no time to build marketing systems into his business. He had no time to do the things that would bring him a consistent flow of new prospects “while he slept.”

So, his business was stuck in the rut of boom or bust. The only way George could grow his business was to work harder. And he was already working 50 hours a week! Retainers can help you scale your business.

- 3. The Time Cost.** When I set out to be my own boss, my number one goal was to achieve my idea of a perfect lifestyle. A lifestyle that would allow me to spend more time with my family, more time traveling, more time pursuing passions and hobbies. The last thing I wanted was another “job.”

George wanted the same when he set out on his own. And yet George (like most consultants) found himself in a grueling, time-sucking, knuckle-scraping J-O-B. And he saw no way out of it. That’s the cost of NOT strategically implementing strategic pricing models.

Now let’s look at the benefits of implementing these strategies.

Christie is a healthcare cost consultant who got burned out in the corporate world.

As a mother of 5 kids, working a 60-hour week at the job wasn't worth any kind of money!

So, Christie set out with the goal of replacing her corporate income while working LESS than she had in her 9-to-5.

She knew she had the skills, the expertise and the contacts to find and execute projects. **But she didn't know if she'd be able to charge fees high enough to achieve her work-life balance goals.**

And when she started out, it was rough going. Christie charged her clients an hourly rate because that was the only pricing strategy she knew. Trading time for dollars.

She was making about the same as at her corporate job but also working just as much.

Not the work-life balance she was looking for.

But after putting the pricing strategies we teach in place?

"I hold back (work less) to maintain my family-work balance. But even though I'm holding back, I still make about **twice as much as I did as an employee**. I make about **FIVE times** more on consulting fees than I did when I first started.

And I'm able to position myself for **better clients** going forward. So not only do I feel pretty good about where I'm at right now, but I feel pretty good about where I'm going to be in 6 months from now and a year from now.

Christie's story shows how powerful the right strategy can be.

## Let's explore the benefit of retainers as a pricing strategy...

**Consistent income.** Imagine if you had an extra 10 to 20,000 per month coming in every single month. How much more secure would you feel? How much would your anxiety decrease?

**Clients who respect your time and expertise.** People respect and value what they pay for. That's sales psychology 101. If your client pays a premium fee upfront, you better believe they value your advice. And as long as you're delivering results for your clients and providing value to them each month, they'll continue to pay and appreciate your support and advice.

**Scalability.** When you have consistent and higher income rolling in every month (for the same or less work) then you have the freedom to work "on your business" rather than always "in your business." You are free from the rigid, roller coaster structure. No longer is your business growth limited by your ability to do more work!

Let's dive deeper into retainers and look at **what they are, when to use them, and how to sell them.**

### Retainer Number One: Pay for Work Retainer.

**What It Is:** This is what most people think about when they think about retainers. Your client pays you a certain amount upfront, usually monthly, with the expectation that you will accomplish specific goals (work) that you've agreed on with them.

**When to Use It:** When you want to continue working for a client for a long period of time, not just a month or two.

#### How to Sell It:

- List out what you'll be delivering each month
- Put \$ value to the benefit you'll be delivering to the client
- Show them that your retainer is less than 20% of the benefit you'll deliver
- Show them how an upfront retainer guarantees them your attention and focus on their project.
- Show them how an upfront retainer makes them a priority over your non-retainer clients.

## Retainer Number Two: Pay for Access Retainer

**What It Is:** Your client pays you upfront, monthly or yearly, for access to you – your knowledge, experience and expertise. Rather than paying for specific deliverables, they are paying to be able to reach you quickly when they have an important question or problem.

**When To Use It:** When you've worked with the client for a while, have achieved good results for them, and have a high level of trust with them. When they see you as an authority and an expert. When they understand that your time is very valuable and very limited. When they know you are not easy to reach under "normal" circumstances.

**How To Sell It:** This is almost impossible to do when you don't have a history with the client. But when you do, make sure they understand...

- Exactly what you did for them in previous projects. How much money and time you saved their company. Put it in "case study" form.
- Explain how you can help them do the same in other areas of their business in the future.
- Put a dollar value to the monthly benefit they will receive by having access to you.
- Make sure your retainer is 1/5 or less of the benefit they will receive. Make it a no-brainer.
- Explain why losing access to you will mean not being able to reach you for days, weeks, or months because you're so busy with other high-paying, demanding, pay-for-access clients. Put a dollar value to the COST of losing access.
- Explain why quick access to your expertise can help them solve problems much faster and save them lots of money
- Illustrate the value of access to your network, your processes, your tools.
- Make sure they understand the peace of mind they'll have knowing you're always "just a phone call away."
- Show them how pay for access makes you more like a member of their team than an outside consultant.

Most importantly, the dynamic for a successful Pay-For-Access retainer is when your client WANTS to keep you around. They must see and feel real value having access to you or this structure doesn't work.

This can be a highly profitable retainer strategy. You might have one month or two months, sometimes several months go by where the client doesn't call you or need your help.

But when they do have a crisis, and you solve it quickly, they'll see the value you deliver to them is far greater than the investment they are making to pay for your retainer.

Here's what happens when you implement the right pricing strategy...

*"I've doubled my business in less than 12 weeks. Michael helped me to re-package my offerings and improve my pricing structures which lead to a 40% increase in my fees and I've already landed 2 new projects at my new rate and I'm confident many more to come."*

—**Sonaya Williams**,  
*President, Sonaya Williams Group*

Take just a moment right now and consider how much more freedom you'd have if you were able to earn 40% more... without working any harder....or even working LESS than you are now.

It's possible with the right pricing strategies targeted at the right clients.

If you'd like to learn all the details of structuring retainer models sign up for [Momentum](#), our program for early-stage consultants looking to land their first few clients and reach six-figures.

If you'd like to learn how to successfully structure more lucrative retainers and strategically explore and add performance deals, and consulting for equity apply for Clarity Coaching where we personally work with you step by step through this process. [Apply for Clarity Coaching](#)

# Chapter 4

## Scaling Your Consulting Business To \$1 Million and Beyond

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Sir Edmund Hillary, the famed mountain climber who scaled Everest said,

“It’s not the mountain we conquer but ourselves.”

And when it comes to scaling your business, I think his quote is apt.

If you want to scale your consulting business (earn more while working less), you need to consider two things...

**Where are you now?**

**Where do you want to go?**

Let’s take a look at the first question. Where are you now? I don’t mean how much money you’re making now, although that’s a part of it. What I really mean is...

**What kind of person are you?**

What do you like doing, what do you tolerate, and what do you hate doing?

When it comes to scaling your business, you must ask...

- Do I like managing people?
- Do I like hunting for new clients?
- Do I like wearing all the hats in my business?
- Am I OK with delegating work that I know I could do better myself?
- Do I prefer to work alone?
- Do I like administrative work?
- Do I like doing consulting work and am I OK doing more of it?
- Do I like predictable, repeatable work?

- Do I like every project to be unique and customized?

These personality traits and preferences of yours are **not easy to change**.

And if you choose the wrong path to scale your consulting business, you might find yourself in a situation where you're doing things that don't fit who you are.

And that's no fun.

The second question is "**Where do I want to go?**"

Another way to ask this question is "What kind of lifestyle do I want from my consulting business?"

- What do I want my life to look like?
- How many hours do I want to work?
- How much money do I want to make?
- How much time do I want to spend with my family?
- How much do I want to travel?
- How much play time do I want?

You'd be surprised at how few consultants answer these questions before setting out on their own. And how many get stuck asking "How did I get here? This is not the life I want? I'm working too hard. I don't have a life!"

Our colleague and friend David asked himself these questions and the answers paved his path to scalability.

David loves his work and did not mind working a lot of hours as long as that work was fascinating.

David likes being a one-man-show. He likes the independence and control of working (mostly) alone. He loves the consulting work he does. He finds the problems he works on for clients fascinating. He loves the creativity of customizing his solutions for each new project.

He geeks out over this stuff.

He wants to sell himself and his expertise, not products.

Repetition bores him.

So, based on David's answers to the **Where am I now?** And **Where do I want to go?** Questions he knew that the best model for his business was...

## The Customized Consulting Model

With this type of business model (common among solo consultants), you customize your solution to each client.

You have all the freedom in the world. You get to choose everything: who you work with, how much you charge — and you can customize everything you offer exactly how you like it.

But you're also wearing many different hats at once, you're more vulnerable to the feast or famine cycle, and you are the bottleneck in your business.

It's very easy to end up feeling overwhelmed.

You have to do a lot yourself. Every new project involves some sort of recreation (like when writing proposals), because you don't have the benefit of systems and processes of the productized model.

The wrong personality would be crushed by this model. But David is the right personality so he's thriving.

David could grow his business by switching to one of the other models we'll discuss later (the "firm" model and "productization" model). But David knows, because he asked himself the "WHERE" questions, that those would not give him the life he wanted.

Now, you may be thinking, "This section is about scaling, but it sounds like the Customized Consulting Model is not a model that can be scaled."

**And it's true, the biggest challenge in a customized consulting business is that it is the toughest to grow and scale.**

However, as you'll see below, **there are ways to scale a customized consulting business.** It can be done. It's all about 80/20. Keep reading to find out more.

## Advantages and Disadvantages of the Customized Model

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### Advantages

- Considered to be very much a lifestyle business
- High-profit margin and the ability to 'eat' all the income you take
- Doesn't require management of other people

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### Disadvantages

- Some find it hard to stay motivated and productive when they are the only person in the business
- Difficult to sell because all revenue and clients rely 100% on you
- You tend to take less time off because you feel like you don't earn unless you're working (which is often true)

But what if the answers to your **WHERE** questions look something like this...

- I love working with lots of other people
- The idea of building a team excites me
- I don't mind delegating consulting work to other consultants
- I'm energized by hunting for new clients and developing my business
- I want to build something big and prestigious and sell it someday for nice payday

If you're nodding your head in agreement the best model for you may be...

## The Consulting Firm Model

In this model, you hire consultants to deliver projects, usually billing by the hour or by the day. As the firm owner, you take a margin of the profit.

The firm model is a highly scalable consulting business model that's favorable to growth.

When you're running a consulting firm, you aren't always going to be working

closely with clients on consulting projects. You can, but that's only one part of it.

You're also going to be focused on growing your firm — winning more projects and hiring more consultants. Thus, your income is separate from your time spent delivering on projects, and it often grows with each consultant that you hire.

When you employ various consultants and other people to run your business, you get to focus on what you do best.

Whether that's working on high-value projects or building up your business, the firm model is fantastic for growth — and also for selling once the firm is big enough.

Our coaching program client, JT Badiani has implemented this model in his consulting practice. Since deciding to follow this model, JT has enjoyed significant growth.

*"We had our best year ever last year, adding hundreds of thousands of dollars in new revenue, and I'm very excited for the growth we'll experience this year!"*

*I've worked as part of large consulting companies and consulted for some of the world's biggest businesses. When it came to growing my own consulting business this coaching program was a clear fit."*

—**JT Badiani**,  
*Focused Improvement Consulting, Toronto,  
Former Director, PwC and Dunkin' Brands*

That's the upside of the firm model. Faster growth. More ability to scale. The downside is you must focus on your own business as much or more than you do on your client's.

For JT, the struggle was selling his consulting services. He really had to hone his selling skills in order to pull off the firm model. If you don't like selling, the firm model might not be for you. But remember, whatever model you choose, you're always going to have to do sales and marketing. It's just part of the gig. With the firm model, it might sometimes feel like the WHOLE gig!

You must make it a big priority because you are responsible for developing new business so your consultants have projects to work on.

The more projects you get, the more consultants you can hire, and the more profit you can generate. And the faster you can scale.

## Advantages and Disadvantages of the Firm Model

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### Advantages

- You can hire professionals to handle parts of the business that you don't want to handle
- The business can run without your day to day involvement once it is established
- The business becomes an asset that if you choose to sell will have greater value than if it was just you running the business by yourself

### Disadvantages

- Payroll — you become responsible for paying the salaries of your employees every month
- Heavily focused on business development — if you're into doing consulting work, you might be doing much more business development (sales) than consulting work
- The consulting firm model does have other's relying on you and you must act like a manager and leader every day

What if the answers to your WHERE questions look like this...

- I don't mind working with other people, but I'd rather work on systems
- I like perfecting and simplifying processes
- I like turning services into products I can sell
- I don't mind repetition if it leads to more predictable and consistent income
- I like the idea of a business that makes money while I sleep (or travel or golf!)
- I don't want my income tied to how hard I work
- I love the time and location freedom that efficient systems can give me

Those were the answers that Doug Nelson gave. For Doug the best model to scale business was...

## The Productized Consulting Model

In a productized consulting business, you break down the services you provide, step-by-step — into a series of products. It's like your boxing up your services.

One of the big benefits of a strategically constructed productized offer is its **simplicity and clarity**. If you do this right, clients can grasp the benefits of what you offer much faster than with vague, open-ended custom offers.

Doug noticed this benefit almost right away. He was having difficulty getting the CEOs he called on to sign on the dotted line. But after just 2 weeks of working together on productizing some of his services...

*"I met with a couple CEOs and both asked for a proposal on a next stage of work. Within 3 days I had a confirmed project that was for \$55k and a verbal yes on another for \$33.5k. I am now a fully committed Strategic Offer zealot. Thank you guys for the feedback so far - let's all keep the momentum rolling!"*

—**Doug Nelson,**

*Social sector Board & CEO, Past President BC Cancer Foundation*

Doug's firm used to offer custom consulting, and they suffered from the ups and downs that strategy often provides. Doug decided he wanted off of that **roller coaster ride**.

**Doug prefers the predictability** of the productized approach.

So, Doug looked at his services and broke them down into clear, simple, easy to understand "products."

An old sales adage says, "A confused mind never buys."

The productized consulting model tries to eliminate as much confusion in your prospect's mind as possible.

Another benefit of the productized model, is how easy it is to teach employees how to sell your services, and help your clients implement your services. So, you can see how a productized service model blended with the firm model above, can be a real rocket ship for scalability.

Think about it. In this model, there are no customized proposals, you often avoid lengthy sales cycles, or complex pricing agreements. You put a price on your expertise, package it into a product, and introduce it (marketing is critical, of course) to the marketplace.

**Our business, Consulting Success** is based on the productized model.

We've packaged our consulting expertise into courses, training programs, and coaching for consultants.

If you're a consultant — a subject matter expert — there's nothing stopping you from putting what you know into a product.

If you are used to working very closely with your clients on custom consulting engagements, it can feel a bit unnatural.

But it's entirely within your ability to do. If you'd like help with this [reach out and let's talk](#).

## Advantages and Disadvantages of the Productized Model

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### Advantages

- A great way to scale your consulting business as your income isn't directly related to your time spent billing
- You become a master at your craft as you've developed proven systems and processes developed from doing the same thing over and over
- You create a valuable asset that can be sold and doesn't require your day to day involvement in most cases to operate

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### Disadvantages

- Some find it boring to offer and provide the same service/product over and over
- Often requires more clients (volume) to reach high revenue level and some consultants experience a dip in their revenue when they first start this model

These three consulting business models are only a start. You can mix and match different elements of these. As a solo consultant, you can build products. As a firm owner, you can work on high-value consulting projects or retainers.

Don't think you're "stuck" in a single business model.

Remember, the most important questions to ask are "Where am I?" and "Where do I want to go?"

Your answers will guide you to the right model...or blend of models...for you.

In our coaching programs we spend a lot of time on the WHERE questions. Because what good is it to spend weeks climbing a mountain, and get to the top, only to realize, "I climbed the wrong mountain!" Remember how I said that it was possible to scale a Customized Consulting business?

Here's an example of how it's done...

## How Scott Discovered a Low-Tech Method for Finding 6-Figure Clients (that even a \$20/hour assistant could do!)

Scaling a customized consulting business is all about leverage. You absolutely must spend as much time as you can doing HIGH-leverage work. And delegate LOW-leverage work to others.

If you're running a customized consulting business this is not a "maybe" proposition. This is life-or-death to your business. Spend too much time on low-value tasks and your business won't survive.

But if, like our client Scott, you can learn to delegate, the rewards can be stupendous...

"I'll give you the exact template of one that we did. This is a low tech solution to getting clients, but I found it to be effective when something does hit.

On one of my browser pages on Yahoo, I have all RSS feeds looking at various jobs for certain technologies that we work in. I even have RSS feeds for some of the regional partners that we might be interested in doing business with.

I'll review those every now and then. If there's something that looks interesting, I will try to find somebody on LinkedIn that works at that firm and looks like they might be in charge of that particular area.

I write them a note saying, "I noticed that you're looking for help with this particular technology. I know that you're trying to hire someone. While you're looking for that perfect new hire, I'd like to offer my firm's services. If you need help in these particular technologies, let us know. We'd certainly love to talk with you."

We've gotten several responses that turned into six figure streams of revenue!

We're also implementing more account-based marketing. I've got a great marketing resource off of Upwork. So, we're doing more direct outreach, showcasing some of these technologies that we work with and trying to make contact that way. One simple email like that made me \$400,000 through LinkedIn.

Very simple.

I'm not calling them on the phone constantly. I'm just saying, "Notice you need some help while you're looking for that perfect new hire. If you need immediate assistance, please feel free to call me."

What Scott did was automate and delegate simple, repetitive tasks. It seems simple, but the concept is extremely powerful.

Have you applied this to your business?

How much time can you free up by doing so?

How much more focus and energy can you put on high-value activities as a result?

Scott added hundreds of thousands of dollars to his business as we worked through refining his business model and getting clear on his highest-value activities.

How much revenue could you add in your business?

**If you run a customized consulting business, this is Job Number One...**

- List all the tasks you do in your business (including take out the trash if you do work at home!)
- Sort the tasks from lowest value to highest value
- Identify which lower-value tasks can be done by someone else
- Hire someone to do those lower-value tasks

**This is essential to achieving the lifestyle you want.** It's essential to achieving the goals you set for yourself when you asked, "Where do I want to go?"

If you do this, you can get to the point where you're working 3 hours a day on your highest value task — instead of just 30 minutes. You won't be caught up with your lower value tasks because someone else will be doing them for you.

If you do this the way we teach in our [coaching programs](#), the additional money you earn will pay for the assistant you hire MANY times over.

And it will pay you back in something far more valuable: TIME.

Time is the key to achieving your lifestyle goals. What good does it do you to make \$500,000 more next year, if you have to work 40 more hours every week on top of what you're working now?

To maximize your time, results, impact and income it's critical that you have the right mindset.

## Developing A "Growth Mindset" for Your Consulting Business

Growing a consulting business is difficult.

You'll have to try new things. You'll have to push yourself outside of your comfort zone.

You have to really want it. And you have to take the sometimes-uncomfortable actions to get it.

But most consultants won't do this.

They just keep doing the same things and hoping for different results.

That's the definition of insanity.

Ultimately, scaling your business requires investing in your business. Whether it's in new tools, staff, marketing, or coaching — you must learn to invest in your own business. To take calculated risks. To develop a mindset of abundance, not scarcity.

If aren't willing to invest in your own business, you'll find it very difficult to grow your business.

Sam and I have used aspects of all three of the models discussed in this chapter – so we know the benefits and challenges of each.

At Consulting Success, we can help you scale your consulting business and grow it past what you thought was possible.

Whether you want to...

- Build up your own consulting firm and become a highly-esteemed Managing Director...
- Turn your consulting business into a product-oriented consulting business so you can sell your services at scale...
- Create the perfect lifestyle consulting business, working only with dream clients and charging premium fees...

We can help.

**If you're an early-stage consultant looking to land your first few clients, our Momentum Program** is the right place to start. [See details on Momentum](#)

**If you've been a consultant for some time and want to take your business to the next level, grow not only your revenues BUT more importantly your profit, make a greater impact and create more leverage without tons of extra work, then our Clarity Coaching Program** is for you. [Apply for Clarity Coaching](#)

# Chapter 5

## Our 7 Guiding Principles— Why We Do What We Do

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*The two most important days in your life are the day you are born and the day you find out why.*

—Mark Twain

Throughout this guide, we've given you strategies for improving your consulting business and illustrated them with stories from some of our clients.

Now, we're going to switch gears a little.

We're going to share with you the guiding principles that inform all our strategies, tactics, and business decisions.

Hopefully, by now you realize that we know WHAT we're doing.

Now, we'd like to show you the WHY behind the WHAT.

### Guiding Principle #1: Less Is More

Sam and I are both believers in diving deep... rather than skimming wide.

Here's what I mean.

It's so easy these days to skim the surface. Thumb through clickbait headlines on Facebook, scroll through 148-character blurbs on Twitter, get sucked onto one hundred email lists of one hundred gurus, promoting one hundred tricks, tips and hacks.

We believe it's better to dive deep WITH a few, than to go shallow with a billion.

Rather than read fifty marketing books and never implement any of the ideas, **read one book fifty times and implement all the ideas.**

Rather than subscribe to fifty experts' email lists, **buy the most expensive coaching program from ONE expert and do everything they say.**

Rather than go after every single client that you COULD work with, **focus on fewer IDEAL clients.**

And this principle doesn't apply just to business.

For example, do you have 150 friends that you see for two minutes each month? Or do you have a small number of friends that you see a lot?

Right, you spend more time with the ones that bring you the most joy. If you don't, maybe you should?

It's better when you go deep.

Sam and I used to run three different businesses at the same time! Not fun. It drove us crazy. But we thought we should be doing as MUCH as we possibly could to grow our revenue.

More, more, more.

Eventually we realized that if we concentrated on the areas we really enjoyed, and honed them as much as we could, we'd not only have more fun, we'd be far more profitable.

So, we sold the other two businesses. One of the best decisions we've ever made. We learned that it's not only possible, but EASIER, **to grow through subtraction.** Not addition.

And it's the same in our coaching programs. We only accept clients who are IDEAL for us. We COULD accept far more. But if they're not ideal, **then more always turns into less.**

Sam and I both believe that LESS IS MORE. It's one of the key principles for happiness in life.

And for success in business.

## Guiding Principle #2: Creativity

Consultants are idea people. Our job is to come up with ideas. To create solutions to problems. To see things that others don't see.

If you're not nurturing your creativity, your imagination, your subconscious, you're going to run out of ideas.

So, we both do things to charge and recharge our creative engines.

We travel to get our physical bodies out of the usual geography, to meet new people, and experiences unfamiliar cultures.

We listen to music to get our neurons firing in new directions.

We exercise to get our endorphins pumping.

We take time off to let our “work brains” rest and our “creative brains” recharge.

Have you ever been in the ZONE?

The zone is amazing. It’s when you’re so productive and focused and creative that you forget about time. You are almost literally “outside of time.” You see things more clearly. Athletes say they see everything in slow motion when they’re in the zone!

You can get in the creative ZONE more often by doing the things I mentioned above. Sam and I believe in making those things a priority.

Travel, get into nature, go for a walk, enjoy good food, see live music, go to an art museum.

Whatever gets your creative juices flowing, do it. Put it in your calendar.

You’ll never regret it.

This is so important we talk with our clients all the time about topics like how to be more productive and creative.

## **Guiding Principle #3: Excellence**

Excellence is an overused word, especially in corporate America. It’s so overused that it can almost mean anything and nothing at the same time.

So, what do Sam and I mean when we say excellence?

Well, it’s something like “Always asking better questions.”

Forgive me if I get a little philosophical here, but life is not about answers. You’ll never get the FINAL ANSWER TO THE MEANING OF LIFE.

Every answer, if you’re a real truth seeker, will lead to another, deeper, more profound question. And then another. And then another.

Excellence to us means never resting after finding the FIRST answer. Always asking better questions every time you find an answer. Never settling. Always seeking higher truth and higher excellence.

Life is not about finding answers, it's about learning to ask better and deeper questions.

### **And so is business, right?**

You'll never get to a FINAL ANSWER to the problems in your business...or your client's business.

"OK, now we've solved every single problem and we never have to make another decision ever again!" No, you ask good questions...that lead to good answers...that lead you to more questions. And the quest keeps going.

That's the way Sam and I are about our lives and our business.

We're always trying to ask better questions. We believe the quest to always ask better questions leads to excellence.

How do we do this?

One of our mentors once said, "If you're the smartest person in the room, you're in the wrong room."

So, Sam and I try to get into as many rooms as we can where we are NOT the smartest!

We try to surround ourselves with excellent people, quality people, positive people, people who ask profound questions. People that challenge our assumptions.

Motivational speaker Jim Rohn famously said, "You are the average of the five people you spend the most time with."

So, Sam and I make it a habit to be around people who are smarter than we are, wealthier than we are, more successful than we are, and who ask deeper questions than we do!

Are you doing the same?

If you're looking for a community to join and surround yourself with people like this, apply for our [coaching program](#).

## Guiding Principle #4. Global Citizenship

When Sam and I were very young we spent several years living in Israel. We spoke Hebrew. We spent our earliest years in a culture very different from the ones we live in now.

I think those early years, shape our adult appreciation of the benefits of travel. There are very few things that contribute more to a rich, joyful life than visiting the cities of the world and getting to know the people there.

I've lost track of how many countries Sam has visited and worked in. It's been a passion of his since childhood.

And I've known from my early twenties that I wanted a job that would allow me to travel on a regular basis. Not just a corporate job that would give me two weeks' vacation each year. But a job that would allow me spend weeks and even months traveling the world.

This appreciation for languages, cultures, people all around the world is what took me to Japan. It's the reason I spent 5+ years there building a business and consulting for some of the largest Japanese companies around.

At Consulting Success we work with international clients. Every six months we do live events at an international location. We blend our business with travel. We just get a "buzz" out of seeing this lovely, beautiful and interesting world.

Last year I spent 5 months traveling and working around the globe with my family.

We also believe (as you read in the "Creativity" principle above) that travel is a great way to keep your creative juices flowing. The best ideas come from "outside the box."

And the box is not just your business, your industry, but also your geographic and cultural space!

Here's another great one by Mark Twain...

**"Travel is fatal** to prejudice, bigotry and narrow-mindedness, and many of our people need it sorely on these accounts. Broad, wholesome, charitable views of men/women and things cannot be acquired by vegetating in one little corner of the earth all of one's life."

Travel helps you ask better, deeper questions.

Travel can not only make you a more successful business person, it **can make you a better human.**

## Guiding Principle #5: Connection

Email. Text. Facebook. Twitter.

It's gotten so easy to "connect" digitally these days. Sure, in some ways, that's good, but as I shared in this [Forbes article](#), it's not always a good thing.

Sam and I believe that it's become too easy to connect digitally.

We believe that face to face, in-the-flesh connection is vital to being a successful business person and a successful human.

We believe that humans are meant to break bread together, to have deep, wide-ranging, open-ended conversation. We believe we're meant to hear each other's voices. See each other's faces.

So, we make sure "connection" is a big part of what we do.

Phone calls, in-person meeting, meals, live events. We incorporate these more human forms of connection in our programs.

When you hear someone's voice, when you see their face, when you share a meal with them, you get to know them far better than you ever could over email or text or social media.

Because those are more **human** forms of interaction. They allow for deeper connection. They allow us to be real.

That's what we want in everything we do. To be as real as we can.

## Guiding Principle #6: Memories & Experiences

My stepfather passed away from Alzheimer's in 2012. If you've had a loved one suffer from this horrifying disease, you know how excruciating it can be to watch someone just fade away.

And as we were dealing with his decline, I remember reading an article that someone forwarded to me. It was written by a hospice worker. She's apparently spent her entire life caring for people during their final days. A reporter asked her what people on their deathbeds regretted most.

She said they **never** regretted not working hard enough.

They regretted not spending more time with their friends and family

They regretted caring too much about what other people thought about them

They regretted letting fear stop them from pursuing their dreams

I don't want to have those regrets when I die. I want to live life to the fullest in a way that's balanced and thoughtful and meaningful.

And we try our best to craft our programs with these questions in mind...

Are we helping our clients overcome the obstacles to achieving their dreams?

Are we providing meaningful experiences and transformation, not just information?

Are we helping them to build a business that will allow them to spend more time with their family and friends?

Are we giving them the confidence and self-esteem to ignore the nay-sayers and follow their instincts?

In the end, all you have is your memories. Are you creating lasting memories every day?

## **Guiding Principle #7. Health**

This principle probably drives all the others.

We believe that the healthier you are, the more you get out of life.

I go to the gym Monday through Friday, same time, same location. Sometimes I'll throw in a couple of runs in addition to that, depending on the weather.

My mind is clearer when I exercise. I can't imagine NOT doing it.

In fact, when I don't exercise for a few days, my mind starts to fog up. I don't feel as positive or as energized. My productivity and creativity plummet.

Sam practices Muay Thai and boxing four or five times a week. Not at a competitive or sparring level, but for self-defense and fitness. He also says he couldn't imagine not doing it.

He says he gets amazing business ideas so often after his workouts that he's come to expect them. It's part of his idea-generating process.

We're both believers in meditation and mindfulness.

We believe that rest and recreation are key to health. Recently, we decided to do a quarterly recharge. Every quarter, we take a full week off. And "off" means no work. No emails. No texts. No nothing.

We can then come back to our clients and play at a higher level.

This goes back to our “less is more” principle. If you keep pushing more and more and more, you eventually crash and burn.

In order to stay in peak creativity and productivity, you have to schedule in LESS.

You have to take a step back to take two steps forward. You have to slow down in order to go faster!

Robin Sharma has spoken about this many times. The top performing people in the world, the top billionaires, the top athletes, the top politicians, they do “recharges.”

They schedule ‘down’ time to do something completely unrelated to their business. Something that really inspires them and that recharges them.

Then they come back full of energy and new ideas.

Your health, physical and mental and emotional, is the one variable that, if you optimize it, will lead to exponential growth in your business and your life.

### **Do These Principles Resonate with You?**

If these principles resonate with you, then you’ll probably resonate with Sam and I. And you’ll probably resonate with the programs we run for consultants.

We shared these with you to pull back the curtain and show you how we are “back stage.” To show you the beliefs supporting how we run our programs and how we treat our clients.

If you nodded your head while reading this chapter, join us.

**If you’re an early-stage consultant looking to land your first few clients, our Momentum Program is the right place to start. [See details on Momentum](#)**

**If you’ve been a consultant for some time and want to take your business to the next level, grow not only your revenues BUT more importantly your profit, make a greater impact and create more leverage without tons of extra work, then our Clarity Coaching Program is for you. [Apply for Clarity Coaching](#)**