The Expertise-to-Engagement Kit

A practical marketing field guide for consultants

Make your expertise easier to buy.

Position one consulting offer, build a useful discovery call, write a decision-ready proposal, and follow up with a clear commercial process.



A clear offer. A useful conversation. A measurable process.

Includes a six-step guide, twelve original scripts, a 30-day plan and working pages for your own campaign.

Free edition / Version 1.0 / marketingcoach.cc

Your first useful result

Set aside 15 minutes. Start with one real decision in your business.

Do this first

Rewrite one broad service as a bounded engagement: a specific buyer, a costly problem, tangible deliverables, clear exclusions and a defined decision.

Who this is for

Independent B2B consultants with credible expertise who need a clearer offer and a repeatable path from interest to signed work.

The problem to solve

Prospects like the conversation but struggle to understand what they would buy, how the work would run or why it matters now.

What you will build

Turn a broad capability into a focused offer, an evidence-led discovery conversation and a proposal someone can approve.

How to use the kit

Read the guide to understand the sequence. Use the workbench to draft your plan and messages. Review the same inquiry cohort in the scorecard. Keep private customer information in your existing systems. Export the workbench JSON to retain an editable backup.

Open the editable tools: marketingcoach.cc/downloads/industries/consultant/workbench.html

The workflow at a glance

Each step produces an artifact you can use. Keep the process visible to your team.

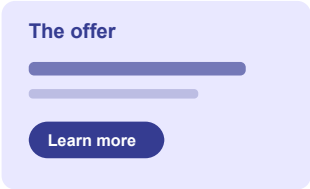
MarketingCoach / Consultants

A clearer path to a decision.

Qualified discovery call to a scoped engagement

1 Package a specific problem

Name the buyer, the trigger and the deliverable. Bound the engagement so a prospect can understand what they are buying.



2 Run a useful discovery call

Understand the current process, consequences, decision owner and readiness. Agree whether a proposal is useful.



3 Write for the decision

Connect deliverables to the problem, state exclusions and responsibilities, and make approval steps explicit.



4 Follow the commercial handoff

Confirm the decision date, answer the open question and move signed work into a prepared kickoff.



Keep one useful artifact from every step.

Build a page that helps people decide

Use this anatomy before adding more traffic.

MarketingCoach / Page anatomy

One page. One clear decision.

Your business

Find where your sales-to-delivery handoff breaks.



A focused diagnostic for service-company founders. Leave with a shared process map, the critical gaps and a practical implementation brief.

Book a fit conversation

Make the practical details visible

Scope. Price. Timing. What happens next.

Show evidence people can assess.

Real credentials, a useful sample and clear process.

Explain the first step.

Who responds? How is the request confirmed?

1 **The promise**
Name the person and the decision.

2 **The action**
Say exactly what the click does.

3 **The details**
Answer scope, price and timing.

4 **The evidence**
Use facts you can substantiate.

5 **The handoff**
Explain what happens afterwards.

Fictional teaching example. Replace every example with your actual offer.

1. Package the problem before the expertise

Read, apply, and keep the result.

A list of capabilities asks the buyer to design the engagement. Start with a problem you can recognize and investigate: a broken handoff, unclear onboarding, reporting that does not support decisions or a launch without an agreed audience. Choose a buyer who owns that problem and can sponsor the work.

Describe the trigger that makes the work timely. A team adding a second location has a different reason to act than a team casually exploring efficiency. Use actual conversations to refine the language; do not assume that an impressive-sounding pain point is urgent.

Define tangible outputs, duration, client inputs, exclusions and the approval process. A diagnostic can be a legitimate first engagement when investigation is necessary. It should produce a useful artifact, not simply delay a proposal for work you already understand.

Put it to work

Write: For [buyer] facing [trigger], this [duration] engagement produces [deliverables] so the team can decide [decision].

You are done when

A prospect can explain the offer without repeating your job title.

Your notes

2. Build an offer page with useful proof

Read, apply, and keep the result.

Lead with the buyer's problem and the bounded engagement. Show what the client receives using an annotated sample deliverable. An example process map or decision brief can make the work concrete even when you cannot publish client names. Label samples honestly.

Include the method, time commitment, price or scoping process, responsibilities and who the engagement is not suited for. Do not hide the client's required participation. If success depends on interviews or data access, explain that before the fit conversation.

Use proof that corresponds to the promise. A previous role establishes experience; it does not prove that this engagement produced a specific outcome. When using a case study, distinguish your contribution, the context, the observed result and the limits of attribution.

Put it to work

Add a sample deliverable and a clear 'what you bring / what I deliver' section to your offer page.

You are done when

The page answers what is bought, how it runs, what it costs or how it is scoped, and how to explore fit.

Your notes

3. Use discovery to decide whether to proceed

Read, apply, and keep the result.

Send a short agenda before the call. Begin with the current situation: what happens today, where the difficulty appears, who is affected and what has already been tried. Ask for examples rather than inviting a broad tour of the organization.

Explore consequences without inventing a financial value. If the prospect estimates time lost, label it as their estimate and ask what evidence could validate it. Understand the decision owner, stakeholders, available budget process and timing without turning the conversation into an interrogation.

End with a decision: no fit, more information, a paid diagnostic or a proposal for known work. Summarize what you heard and confirm the next action. A proposal should not be the automatic output of every friendly conversation.

Put it to work

Use the discovery agenda and recap templates. Ask the prospect to correct your summary before scoping.

You are done when

Both parties understand why a proposal is or is not appropriate.

Your notes

4. Write a proposal someone can approve

Read, apply, and keep the result.

Begin with the situation and desired decision in the client's language. Then define deliverables, work sequence, acceptance criteria, exclusions, client responsibilities, timing, price and payment milestones. Include how scope changes are agreed rather than burying the issue in a vague promise of flexibility.

Separate outputs you control from outcomes influenced by implementation and market conditions. You may commit to delivering an agreed analysis; you cannot promise a revenue result without a sound basis. Spell out where the client team must make decisions or do work.

Confirm who needs to review the proposal and how approval works. A clear signature and payment process is more useful than a generic 'let me know your thoughts.' Use appropriate professional contracts for legal terms; this kit provides marketing structure, not a substitute for them.

Put it to work

Check every deliverable against a definition of done and every responsibility against an owner.

You are done when

The buyer can circulate the proposal internally without needing to reinterpret the offer.

Your notes

5. Publish expertise around one buying question

Read, apply, and keep the result.

Choose a question your target buyer asks before they are ready to hire. For the fictional handoff diagnostic, a useful article might show how to spot unclear ownership between sales and delivery. Show a small sample, explain a tradeoff and connect it to the diagnostic offer.

Share the article through a channel where you already have relevant relationships. Ask a few trusted contacts for feedback or an appropriate introduction, without expecting them to endorse work they have not seen. Follow community rules and disclose your role as the creator.

A useful content sequence is problem recognition, a worked example, and an explanation of the engagement. Reuse the same core insight in a short post and a brief video. Do not turn every interaction into a cold pitch or automate messages without appropriate permission.

Put it to work

Create one practical article, one sample deliverable and one personal introduction request.

You are done when

Each piece helps a specific buyer recognize the problem and understand the offer.

Your notes

6. Review decisions, capacity and delivery together

Read, apply, and keep the result.

Track the same inquiry cohort through held discovery calls, proposals and signed engagements. Record why a prospect does not advance. A deliberate no-fit decision is useful when it prevents an unsuitable engagement; it should not be treated as a sales failure to erase.

Track signed work, delivered work, invoiced amounts and collected payments separately. Keep your available delivery capacity visible before expanding outreach. Two projects with conflicting access requirements can exceed capacity even if the sales funnel looks healthy.

At the weekly review, inspect proposal questions and decision delays. If scope is repeatedly misunderstood, improve the offer page. If the buyer lacks authority, adjust qualification. If delivery is overloaded, improve scheduling rather than generating more demand.

Put it to work

Review one recent win, one loss and one stalled opportunity with the same questions.

You are done when

The following week's change addresses an observed commercial or delivery problem.

Your notes

A worked example

Northline Operations (fictional) / Fictional teaching example

Audience

Founders of 10-30-person service companies with slow sales-to-delivery handoffs

Offer

A two-week handoff diagnostic: three stakeholder interviews, one process map and a prioritized implementation brief, priced at $2,500 in this fictional example.

Capacity

Two diagnostic engagements in the next month

Budget

$0 media spend; six hours for an offer page, one useful article and relationship follow-up

One cohort, four observations

Qualified inquiries: 18 | Starting cohort

Discovery calls held: 10 | 55.6% of previous stage

Proposals sent: 6 | 60.0% of previous stage

Engagements signed: 2 | 33.3% of previous stage

What to investigate

Two of six proposals were signed. Review whether the buyer, decision process and scope were confirmed before writing. Four calls without a proposal may be correct disqualification, not failure.

These counts are not client results, forecasts, targets or industry benchmarks. Follow the same group through the review window. Late decisions remain open until reviewed.

The original swipe file

Messages 1-3 of 12 / Adapt the brackets and review before use.

One-sentence positioning

Use on a profile or offer-page introduction.

I help [specific buyer] address [specific problem] through [bounded engagement]. You receive [concrete deliverables] so your team can [decision or action]. The work takes [duration] and requires [client participation].

Warm introduction request

Ask a relevant existing contact, without pressure.

I am focusing on [problem] for [buyer]. I have put together a short example of how I approach it: [link]. If someone you know is actively dealing with this, would you be comfortable introducing us? No need if it is not relevant.

Reply to interest

A prospect has asked about your work.

Thanks for your interest in [engagement]. It is designed for [buyer/situation] and produces [deliverables]. The next step is a [duration] fit conversation to understand the problem and whether this scope makes sense. Here are the details and scheduling link: [link].

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 4-6 of 12 / Adapt the brackets and review before use.

Discovery agenda

Send before an agreed call.

For our call, I suggest we cover: what happens today; where the problem shows up; what you have tried; who needs to decide; and whether a focused engagement would help. If there is a specific example you can safely share, bring it. No confidential material is needed for the first conversation.

Discovery questions

A guide for the call, not a script to recite.

What changed that makes this worth addressing now? Can you walk me through a recent example? Who is affected? What have you tried? What would a useful decision or deliverable look like? Who else needs to be involved? What timing and budget process should we account for?

Discovery recap

Confirm understanding before a proposal.

Here is what I heard: [current situation], [observed problem], and [desired decision]. The constraints are [constraints]. I suggest [next action] because [reason]. Before I scope it, what have I misunderstood or left out?

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 7-9 of 12 / Adapt the brackets and review before use.

Proposal introduction

Use with a complete scope and agreement.

This proposal addresses [problem] through [engagement]. It includes [deliverables], runs for [duration], and requires [client inputs]. The fee is [fee and payment structure]. Exclusions and acceptance criteria are included below. The proposed approval process is [process].

Proposal follow-up

Use on the agreed review date.

Hi [first name], we agreed to revisit the proposal today. Is the remaining question about scope, internal approval, timing or something else? I can clarify that point. If the project is no longer a priority, let me know and I will update my schedule.

Budget mismatch

Offer a real smaller scope if you can deliver it.

The proposed fee covers [scope]. If that is beyond the available budget, we could consider [smaller defined engagement] with [different deliverables]. I would scope and price that separately so the tradeoff is clear. Would that be useful?

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

The original swipe file

Messages 10-12 of 12 / Adapt the brackets and review before use.

Not a fit

Decline unsuitable work clearly.

Thank you for explaining the situation. Based on [reason], my current engagement is not the right fit. You may need [type of support] first. I would rather be clear now than recommend work that does not address the problem.

Kickoff handoff

After agreement and required commercial steps.

We are ready to begin [engagement] on [date]. The first session covers [agenda]. Please confirm [owner] and arrange [approved inputs/access] through [secure route]. Our agreed deliverables are [deliverables], with a review on [date].

Expertise post

Use a real pattern or clearly labeled example.

A common sign of [problem] is [observable symptom]. Before buying another tool, map [specific handoff or decision]. Ask: who owns it, what information is needed, and what happens when it stalls? I created a [sample/checklist] to help: [link]. If you need a focused review, see [offer link].

Use appropriate contact preferences. Stop follow-up when the person replies, declines or asks you to stop. These are drafts for human review; the kit does not send messages.

Your first 30 days

Choose a realistic owner and review date for each week.

Week 1 / Shape the engagement

Choose one buyer and trigger; define deliverables, exclusions and client inputs; build a sample artifact.

Keep: A bounded consulting offer

Week 2 / Explain it clearly

Publish the offer page and one buyer-focused article; ask existing contacts for relevant feedback.

Keep: A page and useful proof

Week 3 / Improve discovery

Use the call agenda; confirm decision ownership; write proposals only for qualified work.

Keep: Consistent discovery summaries

Week 4 / Review the decisions

Analyze proposal questions, signed work and delivery capacity; revise one part of the commercial path.

Keep: An evidence-led offer revision

Your campaign brief

Complete this before publishing or spending. Use anonymous business information.

Audience and specific situation

Offer, price and scope

Capacity, channel and budget

Owner and review date

Hypothesis: change, observation and reason

Your weekly scorecard

Track the same cohort. Do not mix new inquiries with bookings from earlier periods.

Cohort and review window

Qualified inquiries

Discovery calls held

Proposals sent

Engagements signed

Observed questions or reasons for no decision

One improvement, owner and review date

Ready to launch?

Make the actual customer journey work before increasing distribution.

[ ] The offer, scope, price, capacity and terms are accurate.

[ ] Every placeholder and fictional business detail has been replaced.

[ ] Photos are permitted and claims have supporting evidence.

[ ] The primary action works on a phone and reaches the right destination.

[ ] The confirmation explains what happens next.

[ ] Someone owns responses and respects contact preferences.

[ ] Private customer information stays in approved systems.

[ ] Clicks, inquiries, bookings, completed work and revenue are separate.

[ ] The review uses the same cohort and allows time for delayed decisions.

[ ] The workbench has an exported editable backup.

Industry review

Use sample or anonymized business information. Do not put client secrets in public AI tools or claim revenue, savings or client results you cannot substantiate.

References and useful links

Original editorial workflows. Review requirements that apply to your business before launch.

FTC: Advertising and Marketing Basics

https://www.ftc.gov/business-guidance/advertising-marketing/advertising-marketing-basics

FTC: Endorsements and testimonials

https://www.ftc.gov/business-guidance/advertising-marketing/endorsements-influencers-reviews

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https://www.pexels.com/photo/photo-of-three-people-smiling-while-having-a-meeting-3184338/

https://www.pexels.com/license/

Use and adaptation

Use and adapt the original templates in your own business. Share the kit page with others. Do not resell the kit or present fictional examples as your results. Stock photos remain subject to their source license.

Optional help with your real plan

The existing $350 Marketing Clarity Session reviews one audience, one offer and three priorities for the next 30 days. Review scope before booking.

https://marketingcoach.cc/services/marketing-clarity

Your online kit

https://marketingcoach.cc/resources/consultant-marketing-kit