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About You

Use this section to write down as much as you can about yourself. Including your experiences, knowledge and what comes to you the easiest.

What do people rely upon you for?

_____
_____
_____
_____
_____

What are the most common questions you have been employed to answer?

_____
_____
_____
_____
_____

What are the roles, positions and titles you've had in the past?

_____
_____
_____
_____
_____

What did you like or dislike about those roles and positions?

_____
_____
_____
_____

What comes to you with ease? For example, what are some things you like talking about non-stop?

_____
_____
_____
_____

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Your Strengths and Weaknesses

This section requires you to furnish a self assessment of your strengths and weaknesses. This also requires feedback from your friends, family and coworkers (also ex-coworkers). What have they identified as your strengths and weaknesses?

What Your Strengths Are (Self)

1. _____
2. _____
3. _____
4. _____
5. _____

What Your Weaknesses Are (Self)

1. _____
2. _____
3. _____
4. _____
5. _____

What Your Strengths Are (Family)

1. _____
2. _____
3. _____
4. _____
5. _____

What Your Weaknesses Are (Family)

1. _____
2. _____
3. _____
4. _____
5. _____

YS

Your Strengths and Weaknesses (part 2)

This is a continuation of feedback from your friends, family and coworkers, etc. Try to make sure you're collecting feedback from a variety of people. Not ALL family, and not ALL coworkers.

What Your Strengths Are (Friends)

1. _____
2. _____
3. _____
4. _____
5. _____

What Your Weaknesses Are (Friends)

1. _____
2. _____
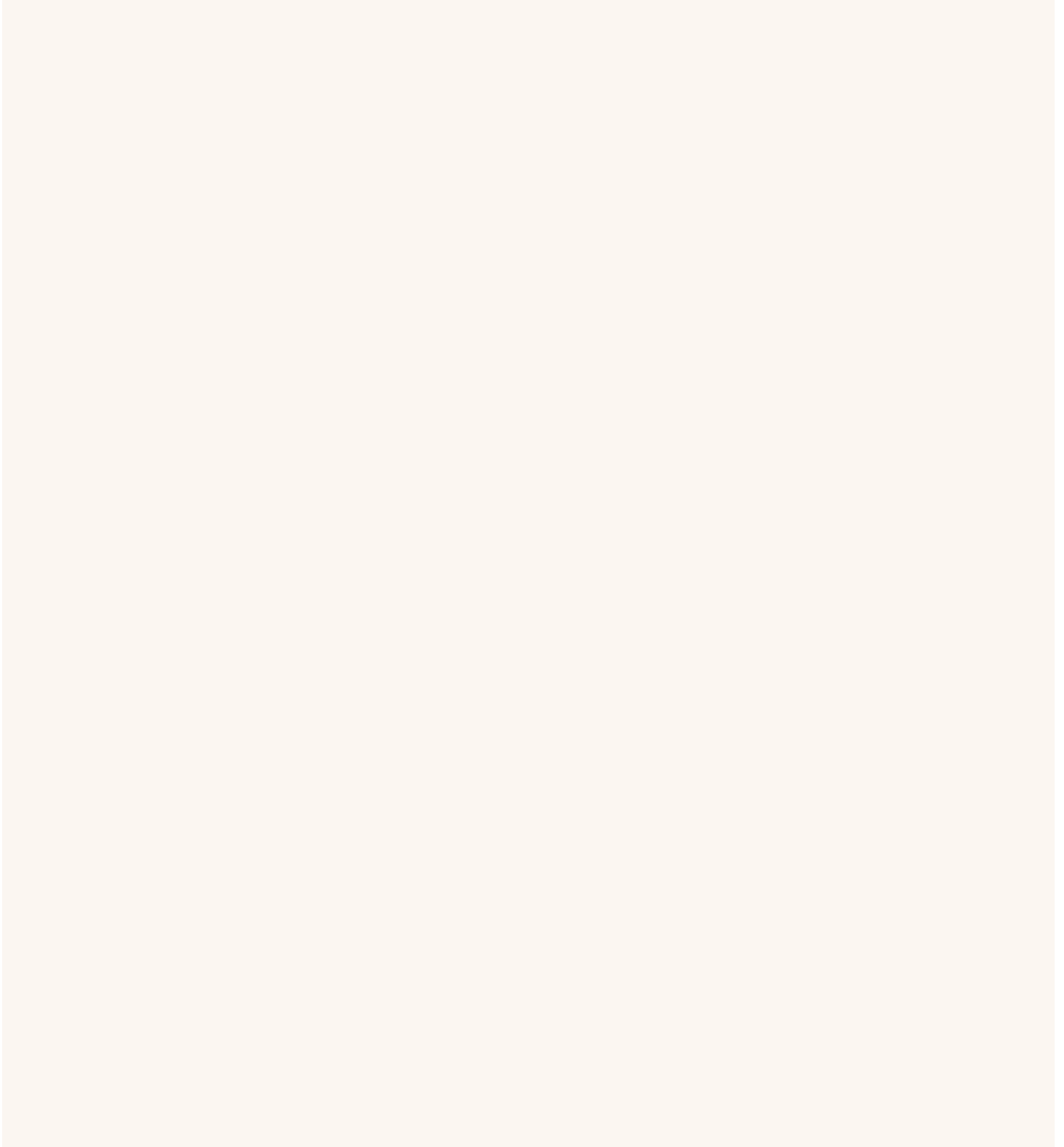3. _____
4. _____
5. _____

What Your Strengths Are (Others)

1. _____
2. _____
3. _____
4. _____
5. _____

What Your Weaknesses Are (Others)

1. _____
2. _____
3. _____
4. _____
5. _____

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Your Strengths and Weaknesses Summary

Use this page to summarize the feedback from your friends, family and coworkers, etc. What are the common words used to describe you and do they equate to how you described yourself?

Your Business Goals

Use this page to write down some of your business goals. It's ok; this does not need to be perfect, but it will lead you to additional clarity with your business. .

1   **I would like to make _____ each month to consider my business a success. Because I need _____ a year to sustain my lifestyle.**

2   **I would like to have_____ clients each month to consider my business a success.**

3   **I want this business to be a success because _____ _____ _____matters the most to me.**

4   **My retirement goals are _____ _____**

5   **Being an entrepreneur is important to me because _____ _____ _____**

6   **I can handle _____ _____tasks, but I will need assistance with _____ in order to make this business work.**

7   **Other notes: _____ _____**

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Your Ideal Client

Use this sheet to pinpoint who your ideal client will be. This is important because you will need to clarify who they are so you can easily find them, and understand their needs.

- They are currently paying for _____ services, and have an adequate budget for it.

- They have / have not utilized _____(your type of) services in the past.

- They are aware they have an issue with _____. And are willing to take measures to address and resolve it.

- They have a time frame for addressing their issues _____(Yes/No)

- They have to be convinced they have an issue with _____.

- They have _____employees. And operate in _____ (states, cities, countries)

- Their point of contact / decision maker is clear? (Yes/No)

- They have a budget of _____, in order to receive consulting services.

- They currently _____(do / do not) have a full time HR department

- Their industry is _____. And you are familiar with that industry

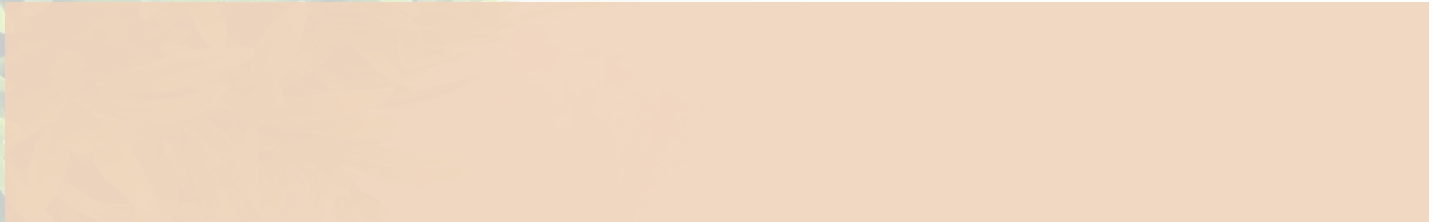- They are an employer of choice? (Yes/No)
  - If not, are they are working towards it? (Yes/No)

- Their pain points are clear (Yes/No). If No, then they are willing to identify them.
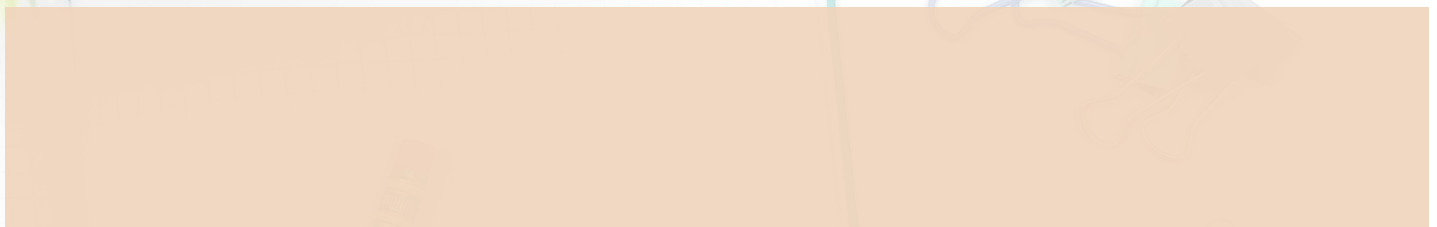
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Market Research

Here you will perform a little research on the type of questions your potential clients are asking and whether you have the resources to assist.
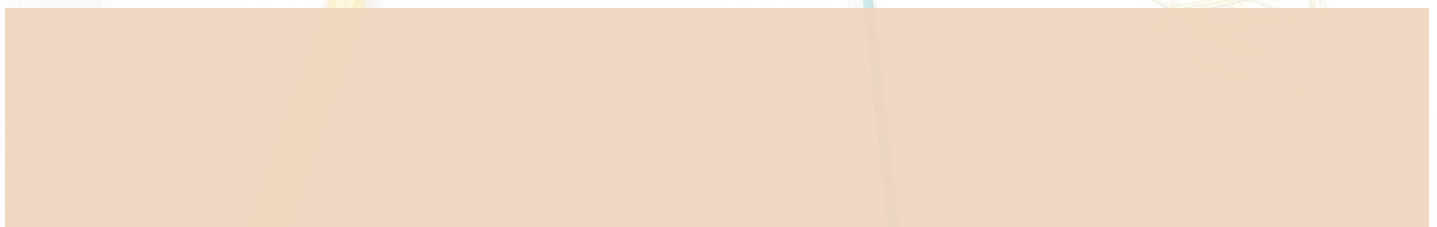
Common Questions They're Asking

Common Social Media / Network Location

Common Physical / Network Location

Your Competitors In This Space

HR Genius Zone

HR can be very broad. Use this sheet to narrow your specialty. Rate yourself on a scale of 1 to 10, based on your confidence level as well as your experience.

Specialty	Rating
Benefits Administration	1 2 3 4 5 6 7 8 9 10
Business Partner / Strategy	1 2 3 4 5 6 7 8 9 10
Compensation Administration	1 2 3 4 5 6 7 8 9 10
Compliance / Employment Law	1 2 3 4 5 6 7 8 9 10
HR Tech / HRIS	1 2 3 4 5 6 7 8 9 10
Organizational Development	1 2 3 4 5 6 7 8 9 10
Payroll Processing	1 2 3 4 5 6 7 8 9 10
Performance Management	1 2 3 4 5 6 7 8 9 10
Recruiting	1 2 3 4 5 6 7 8 9 10
Safety & Health	1 2 3 4 5 6 7 8 9 10
Training & Development	1 2 3 4 5 6 7 8 9 10
Other Specialty_____	1 2 3 4 5 6 7 8 9 10
Other Specialty_____	1 2 3 4 5 6 7 8 9 10

Based on your ratings, this is what your specialty should be.

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Industries

Check off the industries or organization types you are familiar with

- ☐ Agriculture
- ☐ Construction (Residential or Industrial)
- ☐ Education
- ☐ Entertainment
- ☐ Financial & Banking
- ☐ Food & Beverage
- ☐ Government (State, Local, Federal)
- ☐ Health & Beauty
- ☐ Hospitality & Tourism
- ☐ Insurance
- ☐ Legal
- ☐ Media (Newspaper, Radio)
- ☐ Medical & Healthcare
- ☐ Public Services (Waste & Utilities)
- ☐ Retail
- ☐ Transportation (Public, Private)
- ☐ Other: _____

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Your Niche

Based on the feedback from your friends, family and other individuals; you now have a collection of your strengths and weaknesses. You also know if there are any other competitors out there. Finally you have determined what your specialty is and the industries you are familiar with.

Now it's time to write down what your official niche will be. This is what you are comfortable with and you're ready to provide these services without additional training, and investments.

Start-Up

Here is a basic list of things you will need to get started. Add any additional items that are critical for your launch. This includes any materials, office space, supplies, legal documents, etc.

- **EIN**
- **E&O Insurance**
- **Business Banking Account**
- **Register business with your state & local tax authorities**

The Tech

There are a few things to consider in order for your to establish an online presence. Here is a brief checklist of items to think about

Website Hosting

- GoDaddy
- BlueHost
- HostGator
- SiteGround
- Dreamhost

Marketing Materials

- Canva
- Adobe Spark
- Adobe Illustrator
- Google Docs / Slides
- Microsoft Powerpoint

Website Design

- Squarespace
- Wix
- Wordpress

Forms

- Typeform
- Google Forms
- DocuSign
- Adobe Acrobat

Email Marketing

- ConvertKit
- Mailchimp
- ActiveCampaign
- AWeber

Social Media Management

- Hootsuite
- Later
- Zoho Social
- Buffer

Task or Project Management

- Trello
- Asana
- Clickup
- Airtable
- Monday.com

Other Items

- _____
- _____
- _____
- _____

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Obtaining Clients

Here are some general tips

✓ **Go Where They Are**
Not all of your clients will be obtained through social media, so make sure you're somewhere so they can have access to you.

✓ **Attract Them To You**
This is also a part of the reason why you should be where they are. You will be creating content and other resources that will attract them to you. Try avoid chasing clients.

✓ **Provide Value**
When you interact with them in person or online; make sure you are aware of their pain points and something that is valuable to them.

✓ **Screen Them**
Not all of your potential clients will be good clients. Make sure you ask questions to screen out the bad apples.

✓ **Build Your Network**
This includes online & offline communities. You will also need strategic partners who can spread the word for you.

✓ **Follow-Up Power**
Always follow up with them after the initial consultation, or after they have expressed interest in you. You want to do this while you're fresh on their minds.

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The End

I hope this has been resourceful. Feel free to let me know if I missed anything, or if you have any questions.

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