

My VA Role Definition

PART 1 — IDENTITY AND DIRECTION

Write two or three sentences, in your own words: what a Virtual Assistant is, what kind of support one provides, and how a VA business differs from remote employment. The test: could you say it naturally to a curious relative? No borrowed marketing language.

My definition (two or three sentences):

Date written:

WHERE THIS GOES NEXT *This is the first entry in your workbook. Lesson 2's is/is-not list will challenge it, and the Module 5 checkpoint will refine it into your business concept.*

REVISED date _____ what changed _____

My Is / Is-Not List

PART 1 — IDENTITY AND DIRECTION

Define your business by its edges: what it is, and just as deliberately, what it is not. Then add the three red flags you personally most need to watch for, drawn from the misclassification and scam discussion in the lesson.

My VA business IS	My VA business IS NOT

The three red flags I personally most need to watch for:

1.
2.
3.

WHERE THIS GOES NEXT This page is a standing screening tool. When an opportunity appears, check it against the is-not column before replying. Module 14, Lesson 7 sharpens it into a full safety checklist.

REVISED date _____ what changed _____

My Problems-and-Value List

PART 1 — IDENTITY AND DIRECTION

List five problems a small business might pay a VA to relieve. Write each one three ways: the task, the problem, and the outcome. Stay on the rungs of the value ladder you can honestly claim.

#	The task (what the VA does)	The problem (what the client struggles with)	The outcome (what improves)
1			
2			
3			
4			
5			

WHERE THIS GOES NEXT *This list is your first practice at value language. It feeds the service-category map in Lesson 4 and the client-problem work of Module 4.*

REVISED date _____ what changed _____

My Service Category Map

PART 1 — IDENTITY AND DIRECTION

List the service categories presented in the lesson. Mark each one — looks like a fit, possible later, or not for me — with one honest sentence of reasoning: current skill, interest, or risk. No commitments; this is a first reading of the territory.

Service category	My mark (fit now / possible later / not for me)	One honest sentence of reasoning

WHERE THIS GOES NEXT *Module 3's skill inventory will confirm or correct these first impressions. Keep both — the difference between them is useful information.*

REVISED date _____ what changed _____

My Label Worksheet and Positioning Decision

PART 1 — IDENTITY AND DIRECTION

For each label, write one sentence on what it describes (a service, a relationship, or a classification) and one on whether it currently fits your intended business.

Label	What it describes	Does it fit my business now?
Virtual Assistant		
Freelancer		
Independent contractor		
Employee		
Consultant		
Online business manager		

My positioning decision — the label(s) I will use publicly at this stage, and why:

WHERE THIS GOES NEXT Lesson 6 builds its starting-position statement directly on this decision, and the Lesson 8 business description carries it forward.

REVISED date _____ what changed _____

My Starting-Position Statement

PART 1 — IDENTITY AND DIRECTION

Choose your starting path and put your reasoning in writing. For most new owners the answer is general VA with a direction of interest — but make it your answer, not the default.

My starting path (general VA / specialized VA / remote operations support):

My reasoning (two sentences, from the side-by-side comparison):

One positioning sentence I could say aloud to a prospect (checked against the language-to-avoid list):

WHERE THIS GOES NEXT *This statement is explicitly provisional. Module 4 tests it against the market; Module 18 revisits specialization when real evidence exists. Pencil, not ink.*

REVISED date _____ what changed _____

My Operating Standards Card

PART 1 — IDENTITY AND DIRECTION

Restate the seven mindset principles in your own words, as rules you intend to follow — then list the standards you commit to meeting before accepting paid work. One page to reread, not an essay.

#	The principle, in my own words
1	
2	
3	
4	
5	
6	
7	

Standards I commit to meeting before accepting paid work:

WHERE THIS GOES NEXT *Keep this at the front of your workbook. Later modules make it concrete: scope in Module 8, payment terms in Modules 9 and 11. You are deciding who the business is before anyone asks it to be something else.*

REVISED date _____ what changed _____

My Business Description — Three Levels

PART 1 — IDENTITY AND DIRECTION

Using a real or placeholder business name, describe what the business is, who it helps, and what it does — at three lengths. Each level must pass the lesson's language principles: plain, specific, honest.

Level 1 — one line:

Level 2 — two to three sentences:

Level 3 — full paragraph:

WHERE THIS GOES NEXT *Together with your role definition, value list, and positioning statements, this is Module 1's output — the raw material Module 2's capacity work and Module 5's concept test will refine.*

REVISED date _____ what changed _____

My Motivation and Fit

PART 2 — CAPACITY, GOALS, AND FIT

Answer honestly — practical needs are welcome here (supplemental income, schedule flexibility, caregiving compatibility, rebuilding career direction). Polish is unnecessary; honesty is the whole point.

I am interested in a VA business because...

The business needs to fit my life by...

The business should not require...

My Motivation and Fit — continued

The kind of work I hope to do is...

The kind of work I may need to avoid is...

Before I take clients, I need to learn or decide...

WHERE THIS GOES NEXT *Lessons 2 through 5 test this paragraph against numbers: your real capacity, a starting business model, and a first income target.*

REVISED date _____ what changed _____

My Starting Capacity Estimate

PART 2 — CAPACITY, GOALS, AND FIT

Available hours are not billable hours. Work the formula honestly: what you can give the business, minus the time the business itself consumes, minus a buffer for real life.

Capacity step	My number (hours/week)	Notes
Available business hours — everything I can safely give the business		
Minus: non-billable time (marketing, admin, learning, bookkeeping)		
Minus: buffer (overruns, health, family, recovery)		
= Realistic starting billable capacity		

My realistic starting billable-hour target is ____ hours per week. I chose this number because...

WHERE THIS GOES NEXT An honest first estimate, not a permanent one — Lesson 3 revises it against your real-life design inventory.

REVISED date _____ what changed _____

My Real-Life Design Inventory

PART 2 — CAPACITY, GOALS, AND FIT

List the factors that shape an ordinary week and mark each one fixed or adjustable. Then revisit your Lesson 2 estimate and correct it — the honest version, not the hopeful one.

Factor shaping my ordinary week	Fixed or adjustable?	Notes
Schedule commitments		
Energy patterns		
Health considerations		
Family and caregiving responsibilities		
Workspace		
Equipment		
Privacy		

My Real-Life Design Inventory — continued

My corrected weekly capacity number (the honest version, after this inventory):

WHERE THIS GOES NEXT *This corrected number feeds directly into your business model choice in Lesson 4 and your income goal in Lesson 5. It can and should be revised as real life changes.*

REVISED date _____ what changed _____

My Starting Business Model Decision

PART 2 — CAPACITY, GOALS, AND FIT

Choose the model your evidence supports — not pride, hype, or another person's timeline. One paragraph per box is enough.

My starting business model (part-time / side-gig / full-time):

The evidence from Lessons 2 and 3 that supports it (capacity number and real-life constraints):

The specific conditions that would justify moving to a larger model later:

WHERE THIS GOES NEXT *This decision becomes an input for the income goal in Lesson 5 and the readiness checkpoint in Lesson 8. A starting position, not a vow.*

REVISED date _____ what changed _____

My First Monthly Income Target

PART 2 — CAPACITY, GOALS, AND FIT

Set the target with the math visible. A target whose math is visible can be revised intelligently; a number pulled from wishes cannot.

Income math	My figure
Corrected weekly capacity (from Lesson 3)	
× a realistic working rate	
= Estimated monthly gross	
Honest note: the gross-to-take-home gap (expenses, fees, tax reserve)	
My first monthly income target	

What would justify raising this target (one sentence):

WHERE THIS GOES NEXT This target carries into the Lesson 8 readiness checkpoint and the pricing work of Module 9.

REVISED date _____ what changed _____

My Startup and Long-Term Goal Lists

PART 2 — CAPACITY, GOALS, AND FIT

Two lists, kept deliberately separate. The startup list runs the next few months; the long-term list waits without applying pressure.

My startup goals (3–5, achievable within current capacity, each concrete enough to check off):

#	Startup goal
1	
2	
3	
4	
5	

My long-term goals (each paired with the evidence that would make it the right time):

Long-term goal	Evidence that would make it the right time

WHERE THIS GOES NEXT Both lists feed the Lesson 8 checkpoint and will be revisited at the Module 17 business review.

REVISED date _____ what changed _____

My Work-Style and Boundary Inventory

PART 2 — CAPACITY, GOALS, AND FIT

Three columns: what energizes, what drains, and the boundaries that are non-negotiable — working hours, communication windows, and client behaviors you will not accept. Then apply it once.

Work that energizes me	Work that drains me	My non-negotiable boundaries

Test case 1 — a service that looks profitable but would FAIL this inventory:

My Work-Style and Boundary Inventory — continued

Test case 2 — a service that **PASSES**:

WHERE THIS GOES NEXT *This document guards your service selection in Module 3 and your package boundaries in Module 9. It is a living document — real client work will sharpen it.*

REVISED date _____ what changed _____

My Module 2 Readiness Summary

PART 2 — CAPACITY, GOALS, AND FIT

One page collecting everything this module produced. It is complete when nothing is missing and the items agree with each other.

Item	Where it came from	Status (confirmed / needs revision / missing)
Corrected weekly capacity	Lessons 2-3	
Starting business model	Lesson 4	
First monthly income target, with its math	Lesson 5	
Startup goal list	Lesson 6	
Long-term goal list	Lesson 6	
Work-style and boundary inventory	Lesson 7	

Do the items agree with each other? (Does the capacity support the income target? Does the model fit the constraints?)

My Module 2 Readiness Summary — continued

I am ready to move into Module 3 because... / I may need to adjust or slow down because...

Revision log — pencil, not ink
Revisions are expected progress. When a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT *This page is your working bridge into Module 3 — and the first document the Module 5 viability checkpoint will reopen.*

My Skill Category List

PART 3 — SKILLS AND READINESS

Place your current abilities into four honest categories. The rule that keeps this list useful: every rating points to evidence — something you have actually done — not confidence.

Skill or ability	My category (comfortable now / needs practice / interested but not ready / avoid for now)	My evidence — something I have actually done

My Skill Category List — continued

WHERE THIS GOES NEXT *Lesson 6 reviews this list when your service candidates are chosen. Comparing it with your Module 1 service category map shows how your first impressions held up — keep both.*

REVISED date _____ what changed _____

My Transferable Skills Map

PART 3 — SKILLS AND READINESS

Work the five steps: list past roles (paid, unpaid, formal, informal), break each into concrete duties, name the skill behind each duty, connect it to a possible VA use, and rate your current readiness honestly. Let the method — not self-image — decide what goes on the map.

Past role or responsibility	What I actually did (concrete duties)	The skill behind it	Possible VA use	Readiness rating*

***Ratings: ready to practice / ready to offer with limits / needs updating / interested but not ready / avoid for now.**

WHERE THIS GOES NEXT This map feeds directly into the service-candidate review in Lesson 6, where every candidate needs an evidence trail.

REVISED date _____ what changed _____

My Starter Skills Rating and Three Practice Picks

PART 3 — SKILLS AND READINESS

Rate all seven starter areas — interest, evidence, readiness — then commit to three practice picks. A balanced set usually includes one organization skill, one communication or scheduling skill, and one tracking or research skill.

Starter skill area	Interest (1–5)	Evidence (1–5)	Readiness (1–5)
Email and inbox support	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Calendar and scheduling support	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Document and file organization	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Basic spreadsheet trackers	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Contact list / basic CRM support	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Customer and client communication support	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Research support	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

Practice pick #1

My Starter Skills Rating and Three Practice Picks — continued

	My answer
The skill	
Why this is a realistic choice	
Experience that supports it	
Tool or process to practice	
The boundary I will keep	

Practice pick #2

	My answer
The skill	
Why this is a realistic choice	
Experience that supports it	
Tool or process to practice	
The boundary I will keep	

Practice pick #3

My Starter Skills Rating and Three Practice Picks — continued

	My answer
The skill	
Why this is a realistic choice	
Experience that supports it	
Tool or process to practice	
The boundary I will keep	

WHERE THIS GOES NEXT Lesson 5 builds your practice plan from these three picks, and Lesson 6 weighs the results when service candidates are chosen.

REVISED date _____ what changed _____

My Future Skill Path

PART 3 — SKILLS AND READINESS

Sort the higher-responsibility skills into honest categories. This is a controlled learning plan, not a specialization — choose no more than two intermediate skills to practice next, and let advanced work wait for training and proof.

Intermediate / advanced skill	Fit for my business direction	My category (interested soon / interested later / requires training / requires proof / avoid for now)
SOP and process documentation		
Workflow cleanup		
Client onboarding support		
Basic project coordination		
Vendor / tool comparison		
Light automation		
Website support		
Email marketing / ads / SEO / launches		

My Future Skill Path — continued

My (maximum two) intermediate skills to practice next — and the evidence that says I am ready:

WHERE THIS GOES NEXT *This worksheet feeds the skills-to-learn roadmap in Lesson 6. Climb the ladder when readiness signals appear, not when impatience does.*

REVISED date _____ what changed _____

My Practice Plan and Results

PART 3 — SKILLS AND READINESS

One project per practice pick: a fictional scenario, dummy data, a defined output, and — the step that makes practice count — a readiness decision at the end.

Privacy rule: fictional people, fictional businesses, fictional records. Always.

Practice project #1

	My plan
Skill being practiced	
Fictional client scenario	
Dummy data I will create	
Expected output	
Self-review notes (after completion)	
Readiness decision: offer with limits / more practice / needs training / avoid for now	

Practice project #2

My Practice Plan and Results — continued

	My plan
Skill being practiced	
Fictional client scenario	
Dummy data I will create	
Expected output	
Self-review notes (after completion)	
Readiness decision: offer with limits / more practice / needs training / avoid for now	

Practice project #3

	My plan
Skill being practiced	
Fictional client scenario	
Dummy data I will create	
Expected output	
Self-review notes (after completion)	
Readiness decision: offer with limits / more practice / needs training / avoid for now	

My Practice Plan and Results — continued

The sample piece worth keeping — the one that could be cleaned up for a future portfolio (label it: “Sample work created for training and demonstration”):

WHERE THIS GOES NEXT *Lesson 6 uses these readiness decisions to choose your service candidates, and your strongest sample becomes raw material for the portfolio work in Module 13.*

REVISED date _____ what changed _____

My Service Candidates and Skills Roadmap

PART 3 — SKILLS AND READINESS

The Module 3 decision: candidates worth testing, services deliberately deferred, a staged learning plan, and the questions you will carry into market research. A candidate belongs here only if it has a worksheet trail.

My service candidates (3–5, one sentence each: “I may help [client type] with [support] so they can [benefit]”)

#	Candidate sentence	Evidence trail (which Module 3 documents support it)
1		
2		
3		
4		
5		

Services I will avoid for now — with the reason (risk, readiness, or fit)

Service	Reason to avoid for now

My Service Candidates and Skills Roadmap — continued

My skills-to-learn roadmap

Time frame	Skill or tool	Practice action	Evidence of progress
Now			
Next 30 days			
Next 60 days			
Next 90 days			
Later			

My Module 4 research questions (one per candidate — a question, not an assumption)

#	Research question
1	
2	
3	
4	
5	

WHERE THIS GOES NEXT *This is the working bridge between Module 3 and Module 4: the problem-first rewrite in Module 4, Lesson 1 starts from this list, and your research questions drive the Module 4, Lesson 5 conversations.*

REVISED date _____ what changed _____

My Problem-First Shortlist

PART 4 — MARKET AND STARTER SERVICES

Rewrite each Module 3 candidate problem-first: one line naming the client problem it relieves, in plain business-owner words. Candidates that can't be attached to a recognizable problem get flagged — not deleted — for the research conversations later in this module.

My service candidate (from Module 3)	The client problem it relieves — in words a business owner would use	Recognizable problem? (yes / flag for research)

WHERE THIS GOES NEXT *This list is the working input for the problem catalog in Lesson 2 and the conversation questions in Lesson 5.*

REVISED date _____ what changed _____

My Starter Problem Catalog

PART 4 — MARKET AND STARTER SERVICES

For each common problem: how it shows up in a real week, which of your candidates could credibly help — and the honest column, whether you can help yet. Knowing what you can't help with keeps you from overpromising in early conversations.

Client problem	How it shows up day to day	Which of my candidates could credibly help	Can I help yet? (yes / not yet)
Owner doing too much routine work			
Administrative backlog			
Follow-up falling through the cracks			
Scheduling chaos			
Scattered information			
Inconsistent customer communication			
Process lives in the owner's head			
Research burden before decisions			

WHERE THIS GOES NEXT This catalog supplies the vocabulary for Lesson 3's translations and the question topics for Lesson 5's market research conversations.

REVISED date _____ what changed _____

My Task-to-Outcome Translations

PART 4 — MARKET AND STARTER SERVICES

Three tasks from your skill inventory or problem catalog, each walked through all six steps. Honest benefit language only: clarity, consistency, and visibility are yours to offer — guarantees are not.

Translation #1

	My answer
The task (plain language)	
The client problem behind it	
The outcome it should produce	
The benefit — why that outcome matters	
The boundary sentence	
Client-facing sentence (puts it all together)	

My Task-to-Outcome Translations — continued

Translation #2

	My answer
The task (plain language)	
The client problem behind it	
The outcome it should produce	
The benefit — why that outcome matters	
The boundary sentence	
Client-facing sentence (puts it all together)	

Translation #3

	My answer
The task (plain language)	
The client problem behind it	
The outcome it should produce	
The benefit — why that outcome matters	
The boundary sentence	
Client-facing sentence (puts it all together)	

WHERE THIS GOES NEXT Lesson 6 uses this method to write your starter list in client language, and the service descriptions you write in Module 13 are this same exercise with higher stakes.

REVISED date _____ what changed _____

My Focus Directions

PART 4 — MARKET AND STARTER SERVICES

Classify your possible directions and pick two or three worth testing. A niche is a focus decision, not an identity — specific enough to research, loose enough to revise.

Possible direction	Focus type (broad starter / service-based / industry-based / blended)	Client problem it addresses	One reason it fits me	One reason it needs research

The two or three directions I will test in the Lesson 5 conversations:

WHERE THIS GOES NEXT *These directions are exactly what the Lesson 5 conversations pressure-test.*

REVISED date _____ what changed _____

My Market Research Kit

PART 4 — MARKET AND STARTER SERVICES

Hypotheses, request script, question bank, and the notes tracker. Have at least three to five real conversations — and listen for patterns, not compliments. The interviewee should talk far more than you do.

My hypotheses (one per direction): “I think [client type] may struggle with [problem], and they may value help with [service direction] because [reason].”

#	Hypothesis
1	
2	
3	

My request script (honest, time-boxed, no selling):

My eight to ten open questions (about real behavior, not hypotheticals)

My Market Research Kit — continued

#	Question
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Conversation notes tracker (one row per conversation — record the same day)

My Market Research Kit — continued

Date	Segment	Problem heard	Current workaround	Exact client language	Service clue / follow-up

WHERE THIS GOES NEXT *What these conversations reveal feeds the Lesson 6 decision directly — and the client-fit statement at the Module 5 checkpoint cites this evidence by name.*

REVISED date _____ what changed _____

My Starter Services Decision

PART 4 — MARKET AND STARTER SERVICES

The Module 4 decision: score the candidates, sort the buckets, write the short list in client language, and frame it in one sentence. The avoid-for-now list is a professional asset — write it with reasons, not apologies.

The six-part fit test, scored 1–5 (read the pattern, not the total)

Possible service	Problem fit	Skill fit	Capacity fit	Risk	Repeatable	Explainable	Bucket (offer now / practice more / avoid for now)

My starter services (3–5, in client-facing language)

My Starter Services Decision — continued

#	Starter service, written so an owner can picture buying it
1	
2	
3	
4	
5	

My framing sentence: “I help [client type] with [service group] so they can [outcome].
My current starter services are...”

Services I will avoid for now — with the reason

Service	Reason (risk, readiness, or fit)

My Starter Services Decision — continued

Revision log — pencil, not ink

Revisions are expected progress. When a conversation or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT This decision is the working input for the Module 5 readiness checks — and when Module 9 turns services into offers and packages, it starts from exactly this list.

Gate One: My Business Concept

PART 5 — VIABILITY CHECKPOINT

Write the paragraph, then test it the only way that counts — out loud, on two real people who don't live in the business world. Their confusion is checkpoint data, not failure.

My one-paragraph business concept (what kind of business, who it serves, what problem, what support — plain words):

The out-loud test (two people outside the business world)

Listener	Where they hesitated or asked questions	What that taught me
1		
2		

Gate One: My Business Concept — continued

My revised paragraph (after the test):

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT Gate one of the checkpoint. Feeds directly into the Go/Revise/Pause decision in Lesson 6 — and it is the seed the Module 13 business description grows from.

Gate Two: My Starter Service Summary

PART 5 — VIABILITY CHECKPOINT

Every service sorted by evidence, not enthusiasm. Ready requires all four tests: explain it, perform it, bound it, support it. A not-yet finding moves a service to its destination — it doesn't sink the checkpoint.

Starter service	Status (ready now / practice first / learn later / avoid for now)	Evidence for every 'ready' (practice work, experience, sample)	Destination for every 'not yet'

Honesty check — any claim above that implies experience, results, or authority I don't have:

Gate Two: My Starter Service Summary — continued

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT Gate two. Required input for Lesson 6 — and the menu Module 9 turns into offers and packages.

Gate Three: My Client-Fit Statement

PART 5 — VIABILITY CHECKPOINT

Client type, confirmed problems, the services that relieve them, and the boundary — every clause traced to evidence from your Module 4 conversations. A clause that traces to nothing but hope is a revision instruction.

My client-fit statement: “I am likely a fit for [client type] who struggle with [specific problem] and need [type of support] so they can [practical outcome], as long as the work stays within [scope boundary].”

The evidence behind each claim

Claim in my statement	Evidence (conversation, observation, researched pattern)

No-fit signals I will respect (the clients I am NOT a fit for, at this stage):

Gate Three: My Client-Fit Statement — continued

Date written:

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT Gate three. Required input for Lesson 6 — and the seed of the ideal-client work in Modules 13 and 14.

Gate Four: My Capacity and Income Reality Check

PART 5 — VIABILITY CHECKPOINT

The checkpoint calculation, run on corrected numbers. Bending the assumed rate until the target works is fiction with a spreadsheet — if the math fails, a variable changes, visibly.

The reality check	My figure
Corrected weekly billable hours (Module 2, the honest version)	
× a realistic starter rate	
= Estimated monthly gross	
Honest note: expenses, fees, software, tax reserve (the gross- to-take-home gap)	
My Module 2 first income target	
Does the goal survive the math? (yes / no)	

If the goal does not survive: which variable changes — the goal, the hours, or the rate-and-offer mix — and how:

Gate Four: My Capacity and Income Reality Check — continued

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT Gate four. Required input for the Go/Revise/Pause decision in Lesson 6; the pricing work of Module 9 builds on whatever survives here.

Gate Five: My Owner-Readiness Self-Assessment

PART 5 — VIABILITY CHECKPOINT

Not a pass/fail test — an honest mirror. Answer the uncomfortable questions especially; those are the ones that matter. Readiness means willing to decide, act, and be responsible — nerves included.

Owner-readiness question	Ready / Developing / Not yet	One sentence of evidence
Can I explain what I offer — and what I don't?		
Can I market, follow up, and talk to prospects without waiting for permission?		
Can I require a signed agreement and payment before work begins?		
Can I track income, expenses, receipts, and a tax reserve?		
Can I hold boundaries — scope, hours, payment — under pressure?		
Can I protect client information and manage access carefully?		
Can I handle difficult conversations and accept responsibility for outcomes?		

Gate Five: My Owner-Readiness Self-Assessment — continued

My advisor-question list (collected across the whole program so far)

Question	Who it goes to (mentor / CPA / attorney / insurance / small-business office)

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT The final gate before Lesson 6 turns the checkpoint into a decision. The advisor questions carry into Module 6 and Module 7, where the professionals earn their fees.

My Go / Revise / Pause Decision Record

PART 5 — VIABILITY CHECKPOINT

Five gates, one call — made from evidence, recorded in writing, signed, dated, and witnessed. An unwitnessed decision is too easy to un-decide. All three outcomes are the checkpoint doing its job.

Gate	Result (Go / Revise / Pause)	If Revise or Pause: the specific item, and its date
1. Business concept		
2. Service readiness		
3. Client fit		
4. Capacity and income math		
5. Owner readiness		

My decision, in one sentence (“My decision is ____ because...”):

The top three reasons:

My Go / Revise / Pause Decision Record — continued

The first three actions after this decision:

If Pause: my revisit date, and the conditions that reopen the decision:

Signed	Date	Shared with (the witness who keeps me honest)

Revision log — pencil, not ink

Revisions are expected progress. When a test, a conversation, or a later lesson changes your answer, update this page and note it here.

Date	What changed	Why

WHERE THIS GOES NEXT This record closes Part 5 and the first phase of the program. On a Go, it is the authorization you give yourself to start the formation sequence in Module 6. On a Revise, it is your dated work list. On a Pause, it is your appointment with the decision.

My Formation Sequence

PART 6 — BUSINESS FORMATION

Six steps, in order — because every step asks for answers the previous one produces. This sheet is the module's working map; nothing files until its prerequisite line says done.

Step (in order)	Status (done / in progress / waiting)	Notes
1. Business concept confirmed (Module 5 Go decision)		
2. Structure understood and chosen (Lessons 2-3)		
3. Name chosen and checked (Lesson 4)		
4. State and local registration researched (Lesson 5)		
5. Formation completed, if my structure requires it (Lesson 6)		
6. EIN, banking, accounting (Module 7 — not yet)		

WHERE THIS GOES NEXT This map governs all of Module 6 and hands off to Module 7 at step six. The most expensive setup mistake is doing the right things in the wrong order — this page is the prevention.

REVISED date _____ what changed _____

A FILLED EXAMPLE

The six steps worked through for Harbor & Helm — the EIN still in progress because structure and name came first.

Formation Sequence

Module 6 · Harbor & Helm · EIN last

Six steps in order. One completed step is not a ready business.

✓	1. Understand the main structures <i>Reviewed LLC vs sole prop</i>	DONE
✓	2. Choose starting structure <i>Single-member LLC (WY)</i>	DONE
✓	3. Choose and check the business name <i>Harbor & Helm, LLC — name available</i>	DONE
✓	4. Register / form the business <i>Filed with WY Secretary of State</i>	DONE
●	5. Apply for the EIN (only after 1–4) <i>IRS online — free</i>	IN PROGRESS
●	6. Save every confirmation record <i>→ 01_Admin folder</i>	WAITING

EIN LAST
EINs are free directly from the IRS; paid “EIN services” charge for a free form.

Harbor & Helm, LLC

Trust official sources (IRS, SBA, your state) over social-media advice.

Example only — illustrative names and figures (Harbor & Helm, LLC).

My Structures Page

PART 6 — BUSINESS FORMATION

Each structure in your own words — proof of understanding, not a decision. Keep legal structure and tax classification in separate mental boxes; the S election lives in the second box.

Structure	What it is (two plain sentences, my words)	One situation where it tends to fit
Sole proprietorship		
Partnership		
LLC		
Corporation (C corp)		
S corporation election (a tax status, not a structure)		

The two or three questions I want a CPA or attorney to answer about MY situation:

WHERE THIS GOES NEXT Feeds directly into the Lesson 3 comparison worksheet and the advisor conversations this module recommends.

REVISED date _____ what changed _____

My Entity Comparison and Provisional Decision

PART 6 — BUSINESS FORMATION

Seven factors, your facts in every cell. Weight them by your actual situation — a solo owner doesn't weigh ownership complexity like a partnership would. The decision is provisional by design.

Decision factor	My situation (my facts, not textbook answers)	Matters most? (✓)	Question to verify / who answers it
Liability and risk (the access and information my services touch)			
Taxes and tax classification			
Ownership and control			
Administrative burden (yearly, not just setup)			
Cost (formation + maintenance + professional help)			
Credibility and client-facing presentation			
Future changes and growth			

My Entity Comparison and Provisional Decision — continued

My provisional structure decision — and the reasoning, in three sentences:

Is the comparison close enough to need an advisor before filing? Who, and what will I ask:

WHERE THIS GOES NEXT *Lesson 6 executes whatever this comparison points to. Where it's close, this completed worksheet is your agenda for the advisor conversation — before anything is filed.*

REVISED date _____ what changed _____

My Name Shortlist and Checks

PART 6 — BUSINESS FORMATION

Four layers — entity, DBA, trademark, domain — and clearance at one layer says nothing about the others. Record every check with its date and source. Then fix the exact rendering: an ampersand can cause real paperwork mismatches.

Candidate name	State entity search (date / result)	DBA question	Trademark screen (USPTO + variations)	Domain / email / handles

My chosen working name:

The EXACT official rendering — spelling, punctuation, entity designator — to be used identically on every record:

Backup names (if the chosen name fails a later check):

My Name Shortlist and Checks — continued

WHERE THIS GOES NEXT *The chosen name must be settled before Lesson 5's registration research and before the Module 7 EIN application asks for it.*

REVISED date _____ what changed _____

My Registration Research Checklist

PART 6 — BUSINESS FORMATION

Your offices, not someone else's: state, county, and city, every answer from an official source. Filing-service blogs are commentary; the Secretary of State is the source of truth.

Registration question	My answer	Official source (.gov page or office contact)
State filing office for my structure		
Exact filing required, current fee, processing time		
Registered agent requirement and rules		
State annual report / renewal obligations		
County requirements (license, occupation tax)		
City/town requirements (license, home-based rules, zoning)		
DBA determination (legal name vs. public name)		
License questions for my specific services		

My Registration Research Checklist — continued

Unresolved questions going to the advisor list (never guessed at):

WHERE THIS GOES NEXT *This checklist, ready to execute, is what the Lesson 6 filing runs on. Renewal dates found here go straight onto the calendar — 60 and 30 days ahead.*

REVISED date _____ what changed _____

My Formation Action Checklist

PART 6 — BUSINESS FORMATION

Execution, carefully: the filing read slowly, every confirmation saved the moment it arrives, the compliance clock acknowledged on day one. If your structure isn't an LLC, walk the equivalent steps — the discipline transfers completely.

Formation step	Status (done / n/a)	Notes / where the record is saved
Name confirmed — exact rendering from Lesson 4		
Registered agent decided (self or commercial)		
Privacy review: what becomes public record		
Articles filed with the official state office (from Lesson 5 research)		
Accepted formation document saved		
Certificate / confirmation / receipt saved		
Filing date and entity ID recorded		
Operating agreement prepared (reviewed if anything unclear)		
First annual obligation on the calendar (60/30-day reminders)		

My Formation Action Checklist — continued

Module 7 readiness line — formation records in hand, no EIN yet, no client payments yet. Confirmed:

WHERE THIS GOES NEXT *Closes Part 6. Formed is not operational: Module 7 builds the EIN, banking, accounting, and tax-reserve layer before the first client dollar arrives.*

REVISED date _____ what changed _____

My Financial Readiness Check

PART 7 — THE FINANCIAL FOUNDATION

The five money-path questions, answered honestly. Every No or Not Sure is a task — and it points at the lesson in this module that resolves it. When this page reads clean, the foundation can hold a payment.

Readiness question	Yes / No / Not Sure	Task / lesson that resolves it
Do I know whether I need or want an EIN at this stage?		Lesson 2
If applying for an EIN as a legal entity, is formation complete first?		Module 6 / Lesson 2
Do I know where client payments will be deposited?		Lesson 3
Do I have, or am I opening, a business bank account?		Lesson 3
Do I have a simple method for tracking income and expenses?		Lesson 4
Do I know how payment-processing fees will be recorded?		Lesson 4
Do I have a plan to reserve money for taxes (or to ask how much)?		Lesson 5
Do I know where formation, EIN, bank, insurance, and tax records will live?		Lesson 7
Do I know which questions need a CPA, attorney, banker, insurer, or agency?		Advisor list

WHERE THIS GOES NEXT Each No or Not Sure is filled by a lesson ahead in this module. A clean version of this page is your signal that the foundation is ready to hold the first payment. The advisor questions you flag here join the advisor list you've kept since Module 5.

REVISED date _____ what changed _____

My EIN Readiness Checklist

PART 7 — THE FINANCIAL FOUNDATION

Everything the IRS application asks for, gathered before you open it — the application doesn't save your progress, and the EIN should describe a business that already exists. Any No or Not Sure is a stop sign. Applying is free, and only at irs.gov.

Readiness question	Yes / No / Not Sure	Notes / next step
Have I chosen the business structure for this stage?		
If I formed a legal entity, is state formation complete first?		
Do I know the exact legal name for the application?		
Do I know whether I'm using a trade name or DBA?		
Is the responsible party an owner (not a formation service or helper)?		
Does the responsible party have the required taxpayer ID info ready?		
Do I know the business mailing address and location info?		
Do I know my reason for applying and a short business-activity description?		
Have I set aside uninterrupted time to finish in one session?		
Do I know where I'll save the EIN confirmation letter immediately?		
Do I know which questions need a CPA, attorney, bank, or the IRS first?		

My EIN Readiness Checklist — continued

The exact legal name and any DBA I will enter, character for character (copy from formation records):

WHERE THIS GOES NEXT Any No or Not Sure pauses the application. The EIN this clears the way for is what the business bank account in Lesson 3 will ask for — save the confirmation letter somewhere permanent the moment it's issued.

REVISED date _____ what changed _____

My Business Banking Checklist

PART 7 — THE FINANCIAL FOUNDATION

The account is the boundary between the business's money and yours. Settle these before you accept a payment; any No or Not Sure is a pause, not a green light.

Banking readiness question	Yes / No / Not Sure	Notes / next step
Have I chosen the bank or credit union I plan to use?		
Have I confirmed the documents required for my business structure?		
Do I know the exact legal name that should appear on the account?		
Do I know whether I need to show a trade name or DBA record?		
Do I have the EIN confirmation or other identification required?		
Have I compared fees, minimum balances, transaction limits, deposit rules?		
Do I know whether the institution is federally insured?		
Do I know where client payments will be deposited?		
Will I use a separate savings account for the tax reserve?		
Have I decided how owner withdrawals will be labeled and recorded?		
Do I know how payment-processing fees will be recorded?		
Have I planned a monthly reconciliation habit?		
Which banking, tax, or legal questions need professional guidance first?		

My Business Banking Checklist — continued

WHERE THIS GOES NEXT *The account anchors the accounting setup in Lesson 4 and the invoicing tools you'll choose in Module 10. Your owner-draw labeling and monthly reconciliation habit start the day the account opens — mixed money is a problem you create quietly now and pay for loudly at tax time.*

REVISED date _____ what changed _____

My Starter Category List (Money Map)

PART 7 — THE FINANCIAL FOUNDATION

A clear-enough chart of categories to begin organized bookkeeping — specific enough to be useful, simple enough to maintain, ready to review with a professional. Keep owner money clearly apart from business expenses.

Category area	Example categories	Use for my business?	Questions / notes
Income	Monthly packages; project fees; hourly work; add-ons		
Payment fees	Card fees; ACH fees; platform fees		
Software / tools	Accounting; CRM; project mgmt; scheduling; e-signature; storage		
Marketing / sales	Website; domain; business cards; advertising; networking		
Professional services	CPA; attorney; bookkeeper; business advisor		
Office / admin	Supplies; printing; postage; business phone; internet share		
Education / training	Courses; books; workshops; certifications		
Travel / mileage	Client meetings; business errands; parking; tolls		

My Starter Category List (Money Map) — continued

Category area	Example categories	Use for my business?	Questions / notes
Owner money	Owner contribution; owner draw; reimbursement; tax returns		
Assets / larger purchases	Computer; equipment; furniture		
Liabilities	Credit card; loan; unpaid bill; tax payable		

WHERE THIS GOES NEXT The accounting tool you set up in Module 10 implements this list, and the monthly money review in Module 17 reads from it. An owner draw is not a business expense — keep that line clean from the very first transaction.

REVISED date _____ what changed _____

My Tax Reserve Plan

PART 7 — THE FINANCIAL FOUNDATION

A working plan, not a final tax calculation — enough to keep taxes from becoming an emergency, and ready to hand to a CPA. Gross revenue is not take-home pay.

Planning item	My decision	Questions / notes
Where will the tax reserve be held?	Separate savings or clearly labeled reserve location	
When will money be moved into it?	After each payment, weekly, or monthly	
What temporary reserve method until a pro advises?	(Hold-only percentage until a CPA refines it)	
What report will I review monthly?	Profit/loss, income by client/service, unpaid invoices, cash balance	
What estimated-tax dates need reminders?	Apr 15, Jun 15, Sep 15, Jan 15 (adjust for weekends/holidays)	
Who will review the plan?	CPA, enrolled agent, tax pro, or bookkeeper	
Where will confirmations be saved?	Compliance or tax folder, by year	

My Tax Reserve Plan — continued

Walk one real or sample payment through the path — gross billed, processing fee, business expenses, tax reserve, owner pay — and write what's actually left:

WHERE THIS GOES NEXT *This is the standing agenda item for your advisor conversations, and the monthly money review in Module 17 checks reality against it. The estimated-tax dates belong on the compliance calendar you build in Lesson 8.*

REVISED date _____ what changed _____

My Client Tax-Information Checklist (W-9 Ready)

PART 7 — THE FINANCIAL FOUNDATION

Everything a client's W-9 request asks for, settled in advance — so onboarding is a copy-and-paste, not a scramble. This information is sensitive: protect it.

Checklist item	My entry / decision	Questions / notes
Legal taxpayer name to use	Exact name that belongs on tax forms	
Business name or DBA	Whether a separate business name is listed	
Tax classification	Correct classification for my structure and tax treatment	
TIN to provide	Business EIN, SSN, or other TIN — verified	
Business mailing address	Address that should appear on client tax forms	
Secure delivery method	How completed W-9s will be sent to clients or platforms	
Storage location	Restricted tax/compliance folder for completed forms	
Review trigger	Update if entity, address, name, classification, or TIN changes	

WHERE THIS GOES NEXT *Client onboarding in Module 12 is where these requests actually arrive. Remember: a 1099-NEC or 1099-K is someone else's report about you, not your income record — your books from Lesson 4 are the record, whether or not a form ever shows up.*

REVISED date _____ what changed _____

My Compliance Folder Setup

PART 7 — THE FINANCIAL FOUNDATION

A single controlled place that holds the whole foundation. Build the structure now, even with empty sections, and move existing records in — a folder built under deadline pressure is built badly.

Step	Action	Done when
1	Create a secure business compliance folder.	It exists in a controlled location with restricted access.
2	Add sections: entity records, EIN/tax identity, banking/accounting, insurance	Each section is named clearly and consistently.
3	Move existing formation, EIN, banking, accounting, and tax-form records into the right sections	Documents are no longer scattered across downloads, email, or personal folders.
4	Create an insurance review note.	It lists services, risks, questions, agent conversations, and next steps.
5	Create a licenses/permits check note.	It records which official state, county, city, or agency sources were checked.
6	Create a renewal and review list.	Annual reports, insurance, licenses, taxes, registered agent, and reviews are listed with dates
7	Protect the folder.	Access, passwords, two-factor, backup, and sharing rules have been reviewed.

My Compliance Folder Setup — continued

Insurance review note — services I offer, the risks they carry, questions for an agent, and next steps:

Licenses / permits check — what I checked and the official source for each (state, county, city, agency):

WHERE THIS GOES NEXT *The records from Module 6 move in now, and the annual review in Module 18 reads from this folder. Lesson 8's maintenance list is what keeps every section current after formation.*

REVISED date _____ what changed _____

My Annual Maintenance and Compliance Calendar

PART 7 — THE FINANCIAL FOUNDATION

Every recurring obligation in one place — its official source, its date, an early reminder, and where proof gets saved — so a deadline never gets to surprise you. Verify changing rules (like BOI/FinCEN) at the source when you act.

Maintenance item	Official source	Date / cadence	Early reminder set	Where proof is saved
State entity / annual report	State filing agency			Formation / State Filings
Registered agent & address	Registered agent / state			Formation / Registered Agent
Local license / permit	City, county, or licensing office			Licenses and Permits
Insurance review	Insurance agent / carrier			Insurance
Estimated-tax review	IRS, state tax agency, CPA	Quarterly		Tax Year folder
Bookkeeping reconciliation	Accounting software & bank	Monthly		Bookkeeping
Year-end accounting cleanup	Accounting software, bank, CPA	Nov-Jan		Tax Year folder
BOI / FinCEN status check	FinCEN BOI page or advisor	Annual / on change		Compliance Review
Software / domain renewals	Vendors, billing accounts			Tools and Subscriptions
Security & backup review	Password mgr, storage, 2FA	Semiannual / annual		Security / Access Review

WHERE THIS GOES NEXT *This list is the seed of the recurring annual business checklist you'll build out in Module 18. Review the calendar at least once a month even when nothing is due — a deadline that can't surprise you is the entire point of the system.*

REVISED date _____ what changed _____

My Contractor-Awareness Statement

PART 8 — THE PROFESSIONAL RELATIONSHIP

A plain-English operating reminder — not a legal document — that you are a business owner offering a service, not an applicant for a job. This is the seed every later piece in this module grows from.

Prompt	My draft
My business offers these services:	
A client may reasonably control these business needs:	
I should retain control over these business decisions:	
Client requests that would make me pause:	
Before any work begins, I need these items in place:	

WHERE THIS GOES NEXT This snapshot shapes your red-flag list (Lesson 2), your scope (Lesson 3), your contract review (Lesson 4), and the How I Work policy (Lesson 7). Keep it honest — a client defining the problem and the deadline is normal, not a warning sign.

REVISED date _____ what changed _____

My Client-Control Red-Flag Snapshot

PART 8 — THE PROFESSIONAL RELATIONSHIP

Where a client's reasonable control ends and employee-style control begins. The point is to notice a red flag during discovery and actually act on it — not to argue definitions, and not to cave to win the client.

Prompt	My draft
A client may reasonably control these items:	
I should normally control these business decisions:	
Schedule or availability requests that would make me pause:	
Scope or task requests that would make me pause:	
Payment or relationship requests that would make me pause:	

My ready boundary sentence — how I'll respond, calmly and professionally, when a request crosses the line:

WHERE THIS GOES NEXT *This feeds your scope boundaries, your contract review, and your How I Work policy. A good contract does not fix a controlling relationship laid underneath it — notice the pattern before you sign.*

REVISED date _____ what changed _____

My Scope Boundaries — Three Starter Services

PART 8 — THE PROFESSIONAL RELATIONSHIP

Each service defined by what it includes AND excludes — because inclusions without exclusions are an invitation. Working drafts, not contract clauses; they feed your packages, proposals, and agreements.

Field	Service 1	Service 2	Service 3
Service name			
What IS included			
What is NOT included			
Client responsibilities / dependencies			
Change-request rule			

WHERE THIS GOES NEXT *These working drafts feed the packages and proposals you build in Module 9 and the client agreements in Lesson 4. State your assumptions out loud here so they become terms instead of arguments later.*

REVISED date _____ what changed _____

My Contract Review Checklist

PART 8 — THE PROFESSIONAL RELATIONSHIP

Used before any agreement is signed or sent — not to practice law, but to slow down, read carefully, and surface questions. Anything marked Unsure or No is a question, not a guess.

Review question	Yes / No / Unsure	Notes or follow-up
Are the correct legal names and contact details listed?		
Does it clearly state the VA is an independent contractor / business?		
Is the scope specific enough to tell included from excluded work?		
Does it state payment amount, timing, method, and late-payment terms?		
Does work begin only after signing and required payment?		
Does it explain client responsibilities (access, files, approvals, feedback)?		
Is there a process for change requests, rush work, and revisions?		
Does it include confidentiality and data/access-handling expectations?		
Does it address ownership of final work, drafts, and pre-existing templates?		
Does it explain term, renewal, cancellation, termination, and offboarding?		
Are there terms I don't understand and should review with a professional?		

My Contract Review Checklist — continued

WHERE THIS GOES NEXT *Use this before any agreement is signed or sent. It returns in Module 18, Lesson 6 as the model for reviewing a subcontractor's agreement from the other side of the table. Flag overly broad noncompete or non-solicitation language for an attorney.*

REVISED date _____ what changed _____

My Confidentiality and Access-Control Checklist

PART 8 — THE PROFESSIONAL RELATIONSHIP

Take only the access the work requires, handle data carefully, and close the loop at offboarding. A business habit that slows you down before access changes hands — not a cybersecurity policy.

Checklist item	Yes / No / Unsure	Notes or follow-up
Do I know what information I will handle?		
Do I know why I need it for the approved scope?		
Can the client give me limited access instead of broad access?		
Will I have a named account or approved delegated access?		
Is MFA enabled where appropriate and available?		
Are passwords shared through an approved method (not email or text)?		
Do I know where client files are stored and how permissions are set?		
Do I know whether I may download, print, export, or copy client info?		
Have I flagged any regulated or highly sensitive information?		
Do I know what to do if I expose or receive information I shouldn't?		
Do I have an access-removal / offboarding list for this client?		
Do the contract, onboarding, and process match these expectations?		

My Confidentiality and Access-Control Checklist — continued

WHERE THIS GOES NEXT *The password and access system in Module 10, Lesson 7 turns this into a working setup, and the access requests in Module 11, Lesson 6 apply it to real clients. Close access cleanly when an engagement ends — forgotten logins are a quiet, growing risk.*

REVISED date _____ what changed _____

My AI-Use Disclosure and Approval Draft

PART 8 — THE PROFESSIONAL RELATIONSHIP

An honest, plain-language position on how and when you use AI — assistant, not replacement. Not final legal language; it becomes a section of your How I Work policy.

1. AI is an assistant, not a replacement for my professional judgment (one sentence):

2. What I will NOT enter into public AI tools without client approval (one sentence):

My AI-Use Disclosure and Approval Draft — continued

3. How AI-assisted output is reviewed before delivery (one sentence):

4. The client's option to restrict or prohibit AI use (one sentence):

Tasks where AI may be appropriate	Tasks where AI needs specific approval first

WHERE THIS GOES NEXT This becomes a section of your How I Work policy in Lesson 7 and a working rule in the client communication setup in Module 12, Lesson 4. If a client prefers no AI, document the preference and respect it.

REVISED date _____ what changed _____

My How I Work Policy — First Draft

PART 8 — THE PROFESSIONAL RELATIONSHIP

The document that explains your business to a client in your own voice — assembled from everything you drafted this module. Not a contract. Mark anything that needs an attorney, CPA, insurance, or payment-processor review.

Insurance categories to ask a licensed professional about (based on my services and the client data I access):

Payment rule	My one-sentence version
Payment-before-work rule	
Late-payment pause rule	
Recurring-payment / renewal rule (if I use one)	

My How I Work Policy — First Draft — continued

Policy section	My plain-language version	Needs pro review?
Contractor relationship		
Scope		
Communication		
Turnaround times		
Access & confidentiality		
AI use		
Payment		
Revisions		
Offboarding		

WHERE THIS GOES NEXT *Module 9 prices what this policy protects; the client start gate in Module 12, Lesson 1 enforces its payment rule; and the boundary resets in Module 16 quote it back when an engagement drifts. Verify recurring-billing and automatic-renewal language against current federal and state rules before you use it.*

REVISED date _____ what changed _____

My Three Offer Directions

PART 9 — OFFERS, PACKAGES, AND PRICING

Turn capability into offers a client can say yes to. Clarity first, pricing later. Each offer starts with a client problem, not a tool.

Field	Offer 1	Offer 2	Offer 3
Client problem this solves			
Type of client who has it			
Tasks involved			
Service area (the name)			
Outcome the client receives			
Clearly NOT included			
Skill/tool I still need to practice			
Offer statement (one sentence)			

My Three Offer Directions — continued

Offer-statement frame: I help [type of client] with [service area] so they can [outcome], without [common frustration].

WHERE THIS GOES NEXT *These three directions are the raw material for the rest of Module 9 — every package you draft comes from one of them. Lesson 2 compares pricing models against them.*

REVISED date _____ what changed _____

My Pricing-Model Comparison

PART 9 — OFFERS, PACKAGES, AND PRICING

Match a pricing model to the shape of the work before naming any price. Models: hourly, monthly usable-hours package, retainer (define it precisely), project package, one-time add-on.

Field	Offer A	Offer B	Offer C
Offer being considered			
Ongoing, one-time, or uncertain?			
How clear is the scope now?			
What would the client actually buy?			
Model that seems to fit			
Must be defined before selling			
Main risk to me (the owner)			
Main risk to the client			
Payment timing that makes sense			
Move forward to Lesson 3? Why?			

WHERE THIS GOES NEXT *No final prices yet. This worksheet feeds the starter pricing-model decision in Lesson 3. Never call something a 'retainer' without defining which kind it is, in writing.*

REVISED date _____ what changed _____

My Starter Pricing-Model Decision

PART 9 — OFFERS, PACKAGES, AND PRICING

Choose the safest starter model for one offer, and test the math before committing. The baseline rate must cover fees, software, taxes, and non-billable time — not just your hours.

Prompt	My decision
Offer being evaluated	
Client problem it solves	
Is the work recurring, one-time, or unclear?	
How predictable is the time required?	
How clear is the scope before work begins?	
Would this client need monthly support?	
Would a defined project add-on be safer?	
Would paid discovery be needed first?	
Recommended starter model	
Reason this model fits	
Boundary or rule needed before selling	

My Starter Pricing-Model Decision — continued

Revision log — pencil, not ink

Revisions are expected progress. When research, an advisor, or a later lesson changes your answer, update this sheet and log it here — drafts in pencil, not ink.

Date	What changed	Why

WHERE THIS GOES NEXT This decision is what Lesson 4 builds packages on. Don't copy another VA's price list — their costs and capacity aren't yours.

My Monthly Usable-Hours Package Drafts

PART 9 — OFFERS, PACKAGES, AND PRICING

Two or three levels, not a catalog. Test the math against your baseline rate, and run the capacity check from Module 2 before you publish a level you can't staff.

Package field	Level 1	Level 2	Level 3
Package name			
Client situation it fits			
Monthly usable hours			
Planning price / baseline math			
Included service categories			
Task intake method			
Basic turnaround expectation			
Client responsibilities			
Capacity concerns			
Questions to resolve before publishing			

WHERE THIS GOES NEXT Lesson 5 draws these packages' boundaries, Lesson 7 writes their rules, and Lesson 8 assembles them into your menu. A package that looks generous but fails the math is a slow way to lose money.

REVISED date _____ what changed _____

My Package Inclusions and Exclusions

PART 9 — OFFERS, PACKAGES, AND PRICING

Say what's OUT, not just what's in — inclusions without exclusions are an invitation. Copy this file once per package. These boundaries flow straight into your proposal and contract.

Boundary field	My notes
Package name	
Package purpose	
Included service categories	
Included task examples	
Excluded services (be specific — no 'etc.')	
Work that requires separate approval	
Client responsibilities	
Urgent / rush-work rule	
Communication boundary	
Questions to ask before publishing	

WHERE THIS GOES NEXT Lesson 8 carries these into the final menu, and the package recommendations in Module 11, Lesson 3 quote them to real prospects. Boundaries that exist only in your head get tested and lost.

REVISED date _____ what changed _____

My Add-On and Project Scope Notes

PART 9 — OFFERS, PACKAGES, AND PRICING

Keep projects out of recurring package hours. Define the deliverable before the price, require approval and payment before work begins, and set a revision limit even when it feels small.

Scope field	My notes
Add-on or project name	
Client problem it solves	
Deliverable	
Included work	
Not included	
Client must provide	
Assumptions behind price / timeline	
Revision or adjustment limit	
Change-request rule	
Payment required before work begins	
Why this add-on fits my business	
Reason to decline or defer it	

My Add-On and Project Scope Notes — continued

WHERE THIS GOES NEXT *This add-on list joins the final menu in Lesson 8. Don't use project work to avoid saying no to a poor-fit request — and don't offer add-ons that need skills you haven't practiced.*

REVISED date _____ what changed _____

My Package Rules Sheet

PART 9 — OFFERS, PACKAGES, AND PRICING

The rules that keep a package honest — overage, renewal, unused hours, response vs turnaround, revisions, delays. Plain language now; aligned with your contract, invoice, and onboarding later.

Rule field	My draft
Package name	
Billing period	
Included usable hours	
When payment is due	
What happens if payment is late	
What happens when hours are used up (overage)	
Additional-hours / add-on approval rule	
Unused-hour rule (expire or limited rollover)	
Standard response-time expectation	
Standard turnaround-time expectation	
Rush-work rule	
Revision rule	
Client-delay rule	
Cancellation / package-change notice rule	

My Package Rules Sheet — continued

WHERE THIS GOES NEXT *These rules align with the proposal, agreement, and invoice so every document says one thing. Response time is how fast you acknowledge; turnaround is how fast the work is done — promise both honestly and separately.*

REVISED date _____ what changed _____

My Starter Service Menu and Package-Fit Guide

PART 9 — OFFERS, PACKAGES, AND PRICING

The capstone: assemble your drafts into one menu a client could choose from, plus a guide for matching a prospect to an offer — and knowing when a prospect is not a fit.

Starter service menu

Package	Who it's for	Hours & price	Key inclusions	Key exclusions

Add-ons and projects

Add-on / project	Deliverable	Price basis	Approval & payment rule

Package-fit decision guide

My Starter Service Menu and Package-Fit Guide — continued

Prompt	My answer
A prospect fits my smallest package when...	
...fits a mid package when...	
...fits my largest package when...	
Signs a prospect is NOT a fit (decline or refer):	
How I'll recommend a package in a real conversation:	

WHERE THIS GOES NEXT *This menu and guide become working tools across the program: the package recommendations in Module 11, Lesson 3, the public service descriptions in Module 13, Lesson 5, and the fit/no-fit checklist in Module 15, Lesson 6 all read from it. A prospect who wants employee-like availability or control is a no, not a small package.*

REVISED date _____ what changed _____

My Minimum Operating System Map

PART 10 — THE OPERATING SYSTEM

A process map, not a software list. Show how leads, clients, tasks, files, money, and records move through the business — in plain English, before choosing any tool.

Region of the business	Where it lives / how it works in my business
Where leads are recorded	
Where discovery notes are stored	
Where active client work is tracked	
Where client files are saved and shared	
Where time, status, or progress is recorded	
Where invoices and payment records are handled	
Where agreements and signed documents are stored	
How passwords and client access are handled	
How important files are backed up	

My Minimum Operating System Map — continued

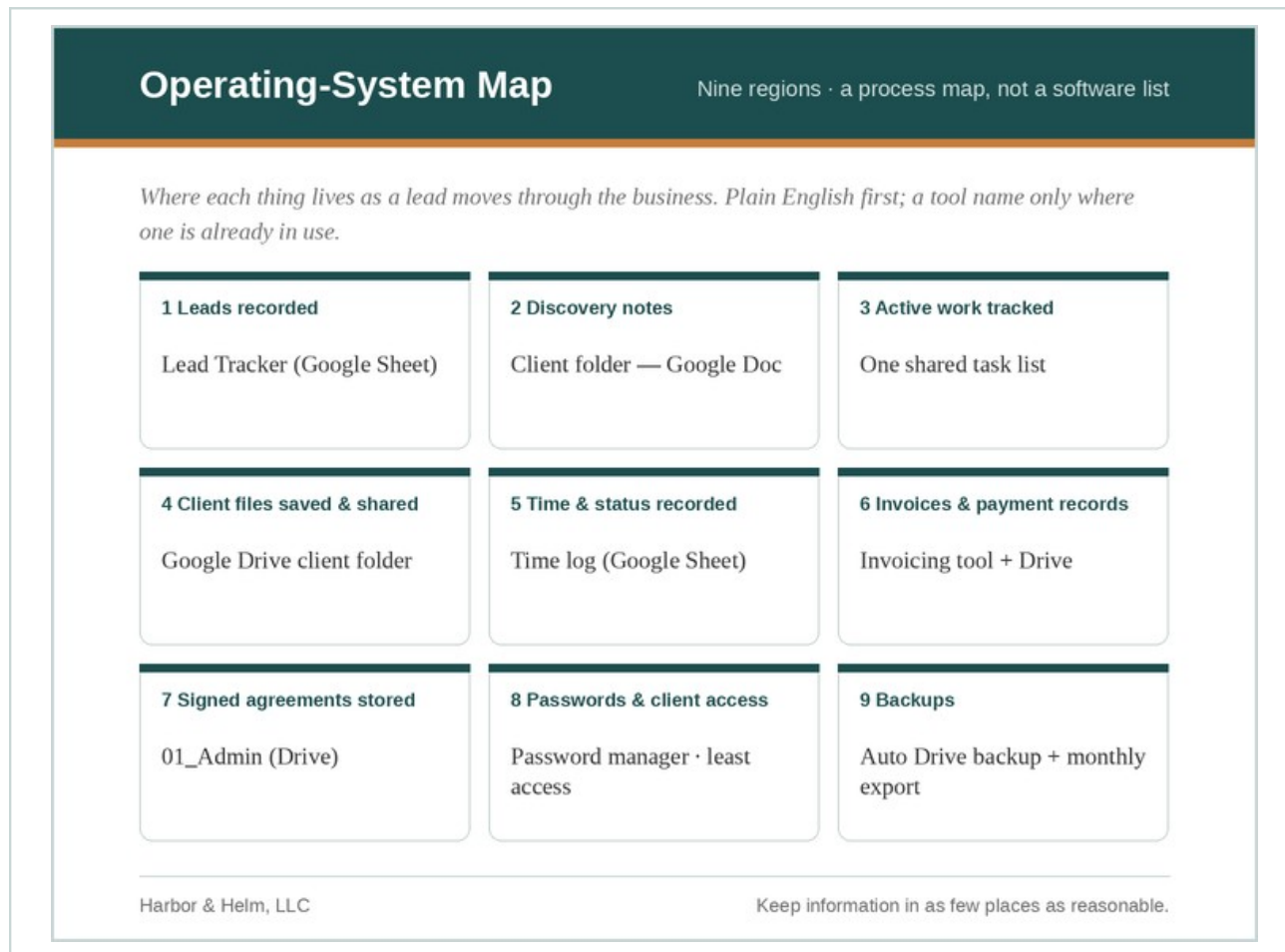
The plain-English test — write what happens when a new lead appears, and how that person moves through the business without getting lost:

WHERE THIS GOES NEXT *Each remaining lesson in Module 10 builds one region of this map, and the Lesson 8 review checks the finished system against it. Rule: don't subscribe to a tool for a function that isn't on this map yet.*

REVISED date _____ what changed _____

A FILLED EXAMPLE

The nine regions filled in for Harbor & Helm on its dedicated Google account — plain English, a tool named only where one is already in use.



Example only — illustrative names and figures (Harbor & Helm, LLC).

My Command Center Setup Plan

PART 10 — THE OPERATING SYSTEM

The first region of the map: email, calendar, and scheduling. One dedicated business account, one calendar as the source of truth, security on before client work.

Question	My setup
What email account will be used for business communication?	
What folder or label structure will keep messages organized?	
What calendar will be the single source of truth for availability?	
What types of events must always appear on the calendar?	
How will discovery calls be scheduled?	
What information will every meeting invitation include?	
What reminders will I use for meetings and follow-ups?	
What security settings must be on before client work begins?	

WHERE THIS GOES NEXT *The inquiry-checking routine in Module 14, Lesson 6 and the call scheduling in Module 15 run on the command center this establishes.*

REVISED date _____ what changed _____

My Lead Tracking System Design

PART 10 — THE OPERATING SYSTEM

A pipeline, not a pile. Spreadsheet or CRM — but specific enough to use immediately. Every lead carries a next action and a date, or it goes cold.

Question	My design
Where will new leads be recorded?	
What pipeline stages will I use (in order)?	
What fields are required for every lead?	
What lead-source options will I use?	
How will the next action and next-action date be recorded?	
How often will I review open leads?	
What close reasons will I use for lost leads?	
What information should NOT be stored in the lead tracker?	
What security settings must be on before using it with real prospects?	

WHERE THIS GOES NEXT *Module 14, Lessons 6 and 8 put this to work as the live lead tracker behind your marketing routine. Knowing why prospects don't convert is some of the most useful data a young business has.*

REVISED date _____ what changed _____

My Folder Structure and Client Folder Template

PART 10 — THE OPERATING SYSTEM

One pattern, every client. Build the reusable template before accepting client files. Default sharing is the careful one — least access, not 'anyone with the link.'

Question	My answer
Where will internal business records be stored?	
Where will prospect files be stored before someone becomes a client?	
What folder template will be copied for each new client?	
Which client subfolders may be shared, and which stay internal?	
What file naming pattern will I use?	
How will drafts, review copies, finals, and archives be separated?	
What sharing permission will be the default?	
What should never be placed in a general shared folder?	
How will access be reviewed when work ends?	

My Folder Structure and Client Folder Template — continued

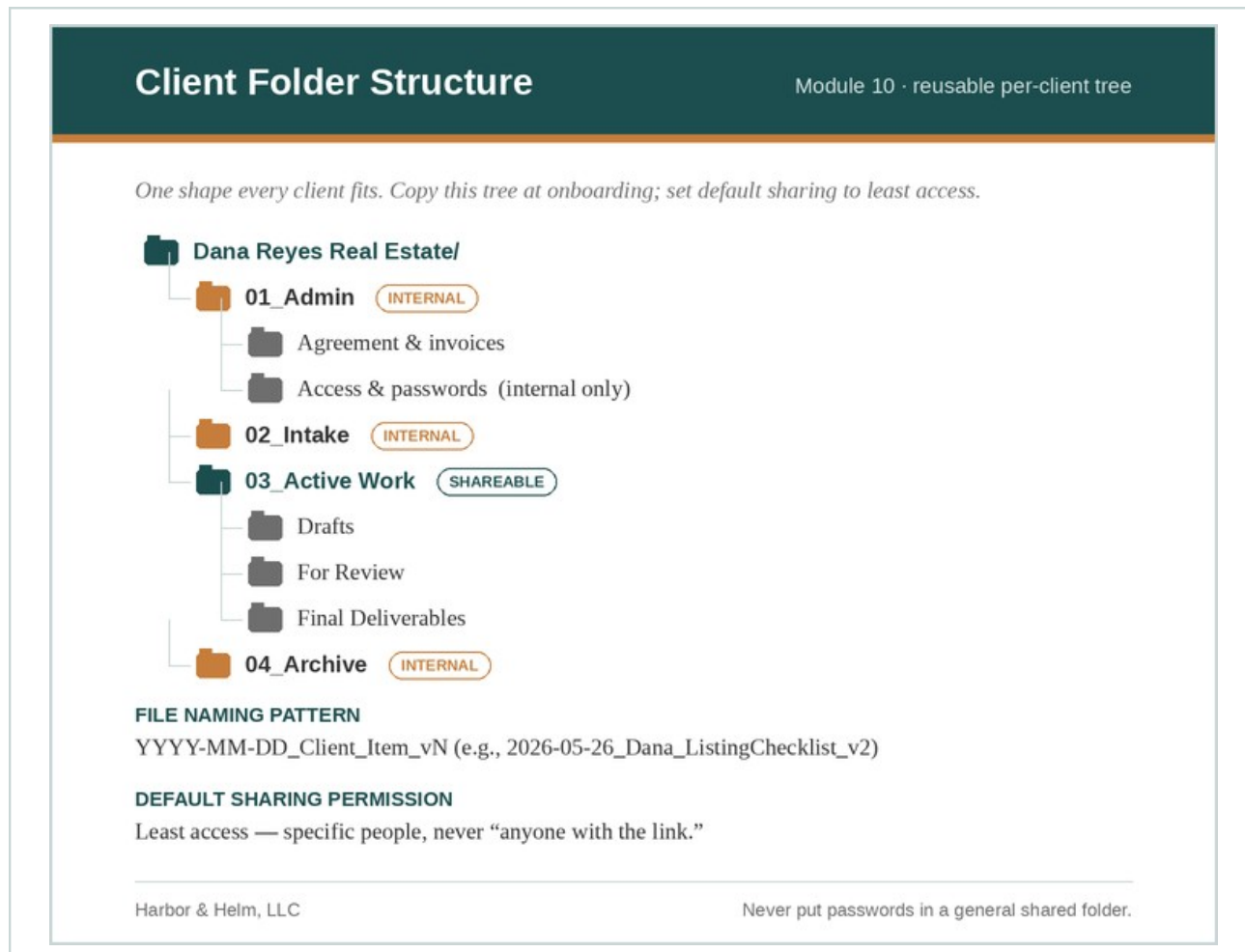
My reusable client folder template — list the standard subfolders a new client folder will contain:

WHERE THIS GOES NEXT *The onboarding checklist in Module 12, Lesson 2 copies this template for every new client. A clean shared folder is part of the client experience — it signals careful hands.*

REVISED date _____ what changed _____

A FILLED EXAMPLE

The tree copied for a real client — Dana Reyes Real Estate — with each folder marked shareable or internal and a least-access default.



Example only — illustrative names and figures (Harbor & Helm, LLC).

My Client Task Workflow

PART 10 — THE OPERATING SYSTEM

Simple enough to use on a busy day, not just when you have time to organize. One place to capture tasks, a clear status for waiting-on-client, and time tracked even inside flat fees.

Question	My answer
Where does a new client task get captured?	
What minimum information must be entered for each task?	
Which status labels will I use?	
How will waiting-on-client items be tracked?	
How will files or links be attached to a task?	
How will time be tracked for hourly, retainer, and fixed-scope work?	
When will I review the task list?	
How often will the client receive a status update?	
Where will final decisions and completed deliverables be recorded?	

WHERE THIS GOES NEXT *The task-intake practice in Module 12, Lesson 6 runs on this, and the active-client intake checklist in Module 16, Lesson 4 refines it. A predictable status update prevents the anxious 'any progress?' message.*

REVISED date _____ what changed _____

My Money and Signatures Readiness Plan

PART 10 — THE OPERATING SYSTEM

Make the back office operational before the first paying client. The accounting tool implements your Module 7 categories; financial and signed records connect back to the client folder.

Question	My answer
Which tool will I use for accounting and bookkeeping?	
Which tool will create and send invoices?	
Which payment methods will I offer at the beginning?	
Where will payment confirmations and receipts be saved?	
How often will I review unpaid invoices and records?	
Which tool will I use for e-signatures?	
Where will completed signed agreements be stored?	
How will invoice, payment, and signed-agreement records connect to the client folder?	
Which financial or legal questions should go to a professional?	

WHERE THIS GOES NEXT *The invoice workflow in Module 11, Lesson 5 and the paid-invoice requirement at the Module 12, Lesson 1 client start gate both depend on the tools this readies.*

REVISED date _____ what changed _____

My Password and Access Policy

PART 10 — THE OPERATING SYSTEM

Protect your side, then theirs. Request only the access the work requires; data you never collect is data you can never lose. Access has a lifecycle — plan its ending now.

Question	My answer
Which password manager will I use for business accounts?	
Which business accounts must have MFA on immediately?	
How will I request client access without asking for unnecessary passwords?	
Where will access be tracked without exposing passwords?	
Which client information will I not collect unless the service requires it?	
How often will client access be reviewed?	
What happens when a project ends or a client relationship closes?	
What will I do if a password, device, or account may be compromised?	

WHERE THIS GOES NEXT *The access requests in Module 11, Lesson 6 follow this policy, and the offboarding close-out in Module 16, Lesson 8 executes its ending. This is Module 8's confidentiality turned into a working setup.*

REVISED date _____ what changed _____

My Operating System Review

PART 10 — THE OPERATING SYSTEM

The checkpoint: confirm the system you mapped in Lesson 1 actually exists. Back up what would hurt to lose, prune tools you don't use, and fix every gap before Module 11.

Tool review

Tool	Function it supports	Where records live	Protected how	E / O / U

(E = essential, O = optional, U = possibly unnecessary)

System walk-through check

My Operating System Review — continued

Question	My answer
Where does a new prospect go?	
Where does an active client file go?	
Where does a client task go?	
Where does time or work status get recorded?	
Where are signed agreements, invoices, and payment records saved?	
Which records are backed up, and how often?	
Which sensitive information should not be collected or should be deleted?	

What must be fixed before I'm ready for Module 11:

WHERE THIS GOES NEXT *Module 11 puts this operating system in front of real prospects and clients. A gap you find here is far cheaper than a gap a client finds later — fix it now.*

REVISED date _____ what changed _____

My Proposal-to-Payment Workflow

PART 11 — FROM CONVERSATION TO CLIENT

One consistent path: a proposal recommends, a quote prices, a contract agrees, an invoice collects. Do not begin work on 'sounds good' — move the prospect through the written agreement and payment first.

Step	Document / action	My notes (tool, who does it, timing)
1	Discovery conversation	
2	Proposal or quote prepared	
3	Client approves the recommendation	
4	Contract sent for signature	
5	Invoice sent per payment terms	
6	Payment received / arrangement confirmed	
7	Intake and onboarding begin	

My Proposal-to-Payment Workflow — continued

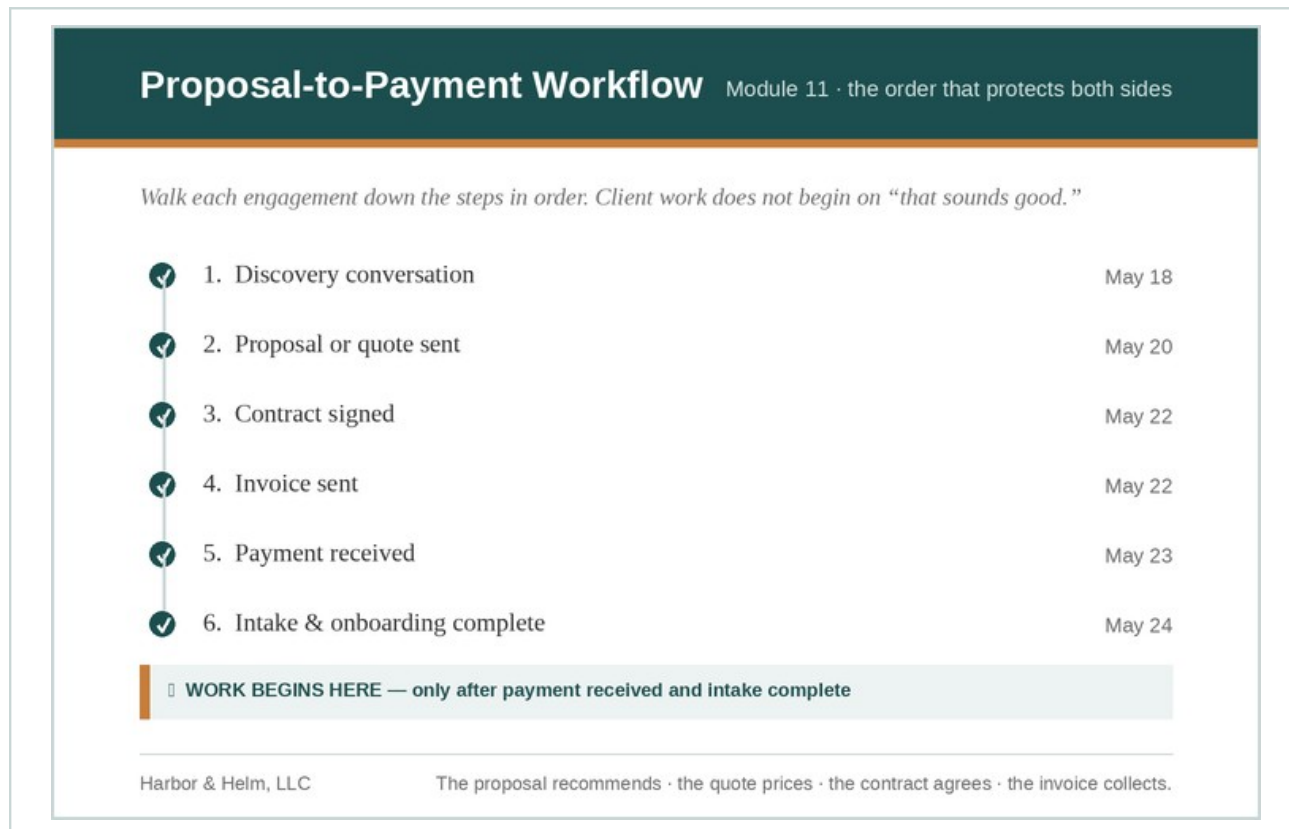
Mark the exact step at which client work is allowed to begin — and write the one sentence you'll say to a prospect who wants to start before it:

WHERE THIS GOES NEXT *Lessons 2 through 7 build each step of this workflow, and the client start gate in Module 12, Lesson 1 enforces its order. The proposal, contract, and invoice must never contradict each other — run a side-by-side consistency check before sending.*

REVISED date _____ what changed _____

A FILLED EXAMPLE

The workflow walked in order for Dana — work begins only after payment is received and intake is complete.



Example only — illustrative names and figures (Harbor & Helm, LLC).

My Client Problem Summary

PART 11 — FROM CONVERSATION TO CLIENT

Open the proposal with the client, not your background. Write their problem back to them clearly enough that they think 'yes, that's exactly it.'

Field	My draft
The client's current situation	
The business impact (time, money, missed follow-ups, stress)	
The client's desired outcome	
One or two unknowns to confirm before pricing or scope	

The summary as one short paragraph the client would recognize as their own situation:

WHERE THIS GOES NEXT This summary is what your proposal opens with, and it feeds the package recommendation in Lesson 3. Don't assume the cause, don't promise results yet, and don't paste raw discovery notes — notes are for you, the summary is for them.

REVISED date _____ what changed _____

My Package or Scope Recommendation

PART 11 — FROM CONVERSATION TO CLIENT

Recommend one right-sized offer from your Module 9 menu — not a buffet. A recommendation reads as expertise; a list reads as uncertainty.

Field	My draft
The package or scope I recommend	
Why it fits this client's problem	
What is included	
What is NOT included	
Timeline / billing period / review point	
What the client must provide before work begins	

WHERE THIS GOES NEXT Lesson 4 puts bounded numbers on this. Exclusions and client responsibilities aren't unfriendly — they prevent the 'I thought that was included' argument. Promise the service and the process, never outcomes you can't control.

REVISED date _____ what changed _____

My Estimate Language

PART 11 — FROM CONVERSATION TO CLIENT

Bounded, not loose. Avoid 'quick,' 'easy,' 'not much.' Every estimate names what it covers, what it doesn't, when approval is needed, and how added work is handled.

Field	My draft
Type of work being estimated	
Estimate / fixed price / approved hourly cap / retainer boundary	
Assumption 1 it depends on	
Assumption 2 it depends on	
Exclusion 1	
Exclusion 2	
Approval point (when work pauses for a yes)	

My one-line change-request sentence for work outside the current scope:

WHERE THIS GOES NEXT *Keep this short enough to drop straight into a proposal. It feeds the payment rule in Lesson 5. When you hit the approved time, pause and ask — don't work past it and hope.*

REVISED date _____ what changed _____

My Payment Rule

PART 11 — FROM CONVERSATION TO CLIENT

Enforce the payment-before-work rule from your How I Work policy. Don't apologize for it — it's how professional services operate. Keep one consistent payment rule across every document.

Field	My draft
The amount or payment structure	
When payment is due	
What must happen before work begins	
What happens if payment is late or never arrives (procedure in Lesson 7)	
Short invoice description that matches the approved scope	

WHERE THIS GOES NEXT *The client start gate in Module 12, Lesson 1 checks for the satisfied version of this rule before any work begins. If you use a deposit, say when the remainder is due; if a retainer, state the hours and billing period.*

REVISED date _____ what changed _____

My Intake and Access Request Checklist

PART 11 — FROM CONVERSATION TO CLIENT

Take only what the work requires. Request the lowest access level that lets you do the job; passwords move through your approved method, never email or text. Data you never collect is data you can never lose.

✓	Field	My answer
☐	Client information I truly need before work begins	
☐	Files, folders, tools, or systems tied to the approved scope	
☐	The lowest access level that would let me do the work	
☐	The client-side person responsible for granting access	
☐	The point at which work pauses if information or access is missing	
☐	The step for removing or reducing access when work ends	

WHERE THIS GOES NEXT This follows the access policy from Module 10, Lesson 7 and feeds the active-client setup in Module 12. Track what you've been given so offboarding in Module 16, Lesson 8 is a checklist you already wrote.

REVISED date _____ what changed _____

My Late-Payment and Nonpayment Procedure

PART 11 — FROM CONVERSATION TO CLIENT

Decide the response before you need it. A calm, documented escalation — friendly reminder, firm reminder, pause-work, final notice — protects you from working unpaid indefinitely. Never improvise late fees or legal threats.

Field	My draft
Invoice due date or payment trigger	
Is there a grace period?	
Friendly reminder — timing and wording	
Firm reminder — timing and wording	
The exact condition that pauses work	
Final-notice step	
Where reminders and client responses are documented	
What happens to access, files, and open tasks if the relationship ends	

WHERE THIS GOES NEXT This is the procedure your Lesson 5 payment rule points to, and the offboarding steps in Module 16 pick up if an engagement closes this way. Handle a disputed invoice with facts and records — that's different from silent nonpayment.

REVISED date _____ what changed _____

My Client Start Gate

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

A client's yes is not permission to begin. Work starts only when every gate item is complete — same gate, every client, every time. Don't reward confusion with free labor.

My one-sentence start rule (plain enough to use with a real client):

Gate item	Status	Notes / date
Proposal or package accepted		
Service agreement signed by required parties		
Required first payment received		
Intake form completed		
Kickoff completed / start confirmation documented		
Primary communication channel confirmed		
Task submission method confirmed		
Client folder / workspace created		
Only necessary access granted (approved method)		
First task confirmed in writing		

My Client Start Gate — continued

Revision log — pencil, not ink

Revisions are expected progress. When research, an advisor, or a later lesson changes your answer, update this sheet and log it here — drafts in pencil, not ink.

Date	What changed	Why

WHERE THIS GOES NEXT The onboarding checklist in Lesson 2 begins only after this gate is satisfied. Put the start rule where it will be seen — proposal, agreement, onboarding email, How I Work policy. An unwritten gate bends under pressure.

A FILLED EXAMPLE

All five gate conditions met for Dana before any work began.

Client Start Gate — filled

Module 12 · a yes is not a started client

All five must be complete before Dana becomes an active client.

CONDITION	DATE CONFIRMED
✓ Accepted proposal or package choice	May 20
✓ Signed agreement	May 22
✓ Required payment received	May 23
✓ Completed kickoff or intake	May 24
✓ Access & workspace ready — only what the first work needs	May 24

All five met — work may begin.

Harbor & Helm, LLC

The gate isn't distrust — it's professional order that protects both sides.

Example only — illustrative names and figures (Harbor & Helm, LLC).

My Client Onboarding Checklist

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

Organized setup for a new client, run after the gate is satisfied. Copy your Module 10 folder template — don't rebuild it. Onboard for the first task; don't collect data you can't yet use.

✓	Onboarding question	My answer
☐	What type of client am I onboarding?	
☐	What package or service did the client choose?	
☐	Who is the main contact, and who approves work?	
☐	What is the primary communication channel?	
☐	Where should tasks be submitted?	
☐	What is the first priority?	
☐	What access is needed for the first approved task?	
☐	What information should NOT be collected yet?	
☐	When will the first weekly update be sent?	

WHERE THIS GOES NEXT This is the checklist you copy for every client, and the offboarding checklist in Module 16, Lesson 8 mirrors it at the other end. Onboarding should not become a project of its own.

REVISED date _____ what changed _____

My Kickoff Agenda and Summary

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

A short meeting with a job: align on priorities, communication, tasks, scope, and access. Not a free strategy session. End it with a written summary — a kickoff that lives only in memory is one you'll disagree about later.

Kickoff question	My answer
What service or package did the client choose?	
What is the purpose of the kickoff meeting?	
Who must be present or represented?	
What scope boundaries should be confirmed?	
What is the primary communication channel?	
How should the client submit tasks?	
What are the first one to three priorities?	
What access is needed for the first approved work?	
What action items go in the kickoff summary?	

WHERE THIS GOES NEXT *The first-week plan in Lesson 5 runs on the priorities this confirms. Send the written summary afterward — it turns the conversation into a shared record and proves you close loops.*

REVISED date _____ what changed _____

My Communication Channels and Working Rules

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

Decide where work lives before messages scatter. Separate communication from task intake. Define 'urgent' concretely — an undefined urgent becomes everything.

Question	My rule
What is the primary communication channel for this client?	
Where should new task requests be submitted?	
What information must be included in each task request?	
What is the normal response expectation?	
What are the normal client communication hours?	
What counts as urgent for this client?	
How should urgent notice be sent?	
Where should files be shared?	
How should passwords or access invitations be handled?	
When should meetings be scheduled?	
How will decisions and approvals be documented?	

My Communication Channels and Working Rules — continued

WHERE THIS GOES NEXT *These rules become part of how every engagement runs. A task request that arrives by text is a task request about to get lost — route work to the one place your task system lives.*

REVISED date _____ what changed _____

My First-Week Work Plan

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

Run a readiness review, choose the first priority well, and deliver one small early win. Review before changing; keep out-of-scope items on a list for a later scope conversation.

Question	My plan
What package or service area did the client approve?	
What are the top three issues the client mentioned at kickoff?	
Which of those issues are inside the approved scope?	
Which item should be handled first, and why?	
What access, files, or decisions are needed before work can begin?	
What small first deliverable can I complete this week?	
What should be delayed or moved to a future scope discussion?	
What notes should I capture for future SOPs?	
What will be included in the first weekly update?	

WHERE THIS GOES NEXT *The task and time system in Lesson 6 runs the work this plan kicks off. An early win buys trust and patience for the larger work behind it.*

REVISED date _____ what changed _____

My Task Intake and Time Tracking Setup

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

Sort every request before doing it. Keep all requests in one place. Track time close to the work — reconstructed time is wrong time — and tell billable from non-billable from internal.

Question	My setup
What is the approved client package or service area?	
What task request did the client send (sample)?	
What information is missing from the request?	
Is the task ready, unclear, blocked, urgent, later, or out of scope?	
What priority label should be assigned?	
What should I ask or confirm before starting?	
How should the time entry be titled?	
Will the time be billable, non-billable, or internal?	
What should be included in the next client update?	

WHERE THIS GOES NEXT The active-client intake checklist in Module 16, Lesson 4 is this system's live successor. The billable/non-billable split tells you whether your Module 9 package math is holding up in reality.

REVISED date _____ what changed _____

My Weekly Client Update

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

The cheapest trust you'll ever buy. Report outcomes, not activity. Build it from your work system, keep it short, and include hours used and remaining when the package works that way.

Question	My answer
What package or service is the client using?	
What work was completed this week?	
What work is still in progress?	
How many hours were used this week?	
How many hours remain in the package or month?	
What blocker, file, access, or decision is needed?	
What are the next one to three priorities?	
Is there any scope or package concern to flag?	
What sensitive information should NOT be in the update?	

My Weekly Client Update — continued

Draft the weekly update in 150 words or fewer — outcomes, not activity:

WHERE THIS GOES NEXT *Lesson 8 adds the review rhythm behind this, and Module 16 turns it into a reusable template. A tight update gets read; a long one gets skimmed.*

REVISED date _____ what changed _____

My First SOP and Monthly Review

PART 12 — ONBOARDING AND FIRST ENGAGEMENT

Write down what you already do. An SOP must be useful, not decorative — built from real work. Quality control matches the work; the monthly review is how a business gets steadily better.

Question	My answer
What recurring client task should be documented first?	
Why is this task worth documenting?	
What starts the process?	
What files, tools, access, or client instructions are needed?	
What are the main steps?	
What should be checked before completion?	
What mistakes are most likely?	
What should be reviewed at the end of the month?	
What SOP change might be needed after review?	

WHERE THIS GOES NEXT *This is where one good engagement becomes a repeatable system. The monthly review feeds directly into the money and operations reviews in Module 17. Keep internal SOPs (how your business runs) separate from client-specific ones.*

REVISED date _____ what changed _____

My Positioning Statement

PART 13 — BRAND AND PUBLIC PRESENCE

Clarity before polish. The plain-language answer to what the right prospect should understand about your business — a promise you can actually keep, not a slogan.

Build the statement	My draft
I help... (client type)	
with... (support area)	
so they can... (practical result)	

Full positioning statement, one sentence:

Truth check	Yes / No
Can I explain this service clearly?	
Can I perform it at a solid professional level?	
Can I show some evidence (sample, workflow, experience)?	
Does it avoid overclaiming authority, results, or specialization?	

WHERE THIS GOES NEXT This feeds the business description in Lesson 2 and the brand guide in Lesson 3. Confident and modest are not opposites — claim only what you can deliver and demonstrate today.

REVISED date _____ what changed _____

My Business Description — Three Lengths

PART 13 — BRAND AND PUBLIC PRESENCE

Expand your positioning into language the public reads. Write in client language, state outcomes without hype, and keep all three versions consistent across every asset.

One-sentence version (profile headline / email signature):

Short version, ~35–60 words (About blurb / social bio):

Long version, ~90+ words (website About / proposal intro):

WHERE THIS GOES NEXT *Underline vague phrases like 'anything you need' and remove them; read each version aloud and cut words that sound impressive but say nothing. Save all three for the website, profiles, and proposals.*

REVISED date _____ what changed _____

My Basic Brand Guide

PART 13 — BRAND AND PUBLIC PRESENCE

One page that keeps everything you publish recognizably from the same business. Consistency reads as credibility. A clean wordmark is a fine starting point — you don't need a custom logo to begin.

Element	My choice
Business name, exactly as it appears publicly	
Positioning statement	
Short business description	
Tone words (3–6, ones I can live up to)	
Logo or wordmark decision	
Color palette + HEX codes (checked for readability)	
Fonts + roles (heading / body)	
Do/Don't rule 1	
Do/Don't rule 2	
Do/Don't rule 3	

WHERE THIS GOES NEXT *Save this in your operations folder so every future asset can match it. The job is consistency, not perfection — an afternoon, not a month.*

REVISED date _____ what changed _____

My Starter Website Outline

PART 13 — BRAND AND PUBLIC PRESENCE

A site with one job: help the right prospect understand you, decide you might fit, and take the next step. For most new VAs, one well-organized page does it.

Section	My draft
Structure (one-page or simple multi-page)	
Hero headline (who I help + what I solve)	
Supporting line under the headline	
Service / package sections (from my Module 9 menu)	
'How it works' (discovery → agreement → delivery)	
About info that builds trust without overclaiming	
Portfolio / proof to feature	
One primary call to action	
Contact method (collect only what's needed)	
Prelaunch checklist (proofread, mobile, links, claims)	

WHERE THIS GOES NEXT *The actual site gets built from this outline. Choose ONE primary call to action, not five; make it readable on a phone; and check nothing public overstates what you can deliver.*

REVISED date _____ what changed _____

My Service Descriptions — Three Services

PART 13 — BRAND AND PUBLIC PRESENCE

Your Module 9 menu becomes public copy. Lead with the client's problem and the result, not a task list. State boundaries plainly — a prospect trusts a description that's honest about what's not included.

Field	Service 1	Service 2	Service 3
Client problem (one sentence)			
Support activities included			
Outcome it produces			
Common deliverables			
Exclusion / boundary			
Next-step sentence			

WHERE THIS GOES NEXT *Keep these consistent with the packages and prices a prospect meets at discovery. Save them for the website, the service menu, and proposals. Review each for plain language and unsupported claims.*

REVISED date _____ what changed _____

My Portfolio Plan (No Client History Needed)

PART 13 — BRAND AND PUBLIC PRESENCE

Create sample work on purpose to show capability honestly. Label fictional/mock work clearly; sanitized real work must be genuinely stripped of confidential detail. Never imply clients you don't have.

Portfolio piece	Fictional or sanitized?	Purpose + problem / process / result	Placement

Confidentiality check — confirm no real client, employer, or customer names, data, or private screenshots appear in any piece:

WHERE THIS GOES NEXT Choose three to five pieces that match the services in your starter offer. Each piece tells a small story — problem, process, deliverable, result. Your portfolio should prove you can be trusted with information, not be built by exposing someone else's.

REVISED date _____ what changed _____

My Credibility and Testimonials Plan

PART 13 — BRAND AND PUBLIC PRESENCE

Earn belief honestly. Before client testimonials, use labeled samples, references, and relevant experience. As real testimonials arrive, gather and display them truthfully — never invented, inflated, or borrowed.

Field	My notes
Credibility inventory — what I can honestly show now (samples, references, experience)	
Social-proof checklist	
Confidentiality review (no private client info in proof)	
Truthfulness review (FTC: truthful, not misleading, substantiated)	
Placement plan — where each signal appears	

Testimonial request language — a simple, specific request to use after good work (with permission to use words and name):

WHERE THIS GOES NEXT *Confident and honest, never inflated. Fabricated proof is both a legal risk and the fastest way to wreck a young reputation. Protect confidentiality even in praise.*

REVISED date _____ what changed _____

My Public Presence Checkup

PART 13 — BRAND AND PUBLIC PRESENCE

Make every public asset work as one presence, then de-risk it. Better to maintain one or two profiles well than half-tend five. Align it, test it, clean it, secure it.

Touchpoint	Status (active / update / retire)	Name & visuals consistent?	Links / claims OK?

Cleanup pass — list what to fix: unsupported claims, outdated services, old pricing, confidentiality risks in screenshots/samples, broken links/forms, and passwords/MFA to set:

My Public Presence Checkup — continued

The one or two platforms I'll maintain intentionally for the next stretch:

WHERE THIS GOES NEXT *Save this checklist for the marketing work in Module 14. A broken contact form is a silent lost client; a hijacked profile is a public emergency — test the links and lock the accounts.*

REVISED date _____ what changed _____

My Marketing Foundation

PART 14 — MARKETING AND FINDING CLIENTS

Marketing is clarity, not volume. Decide who you reach, what you offer, and the safe next step before choosing any channel. Small, repeatable, and measurable beats big and sporadic.

Foundation part	My decision
1. Target audience (narrower than 'everyone')	
2. First two or three services to promote	
3. Problem those services solve	
4. Credibility support (profile, sample, description)	
5. Three realistic lead sources	
6. Safe next step (no sensitive info too early)	
7. Follow-up method (where leads are tracked)	

My Marketing Foundation — continued

Summarize in one paragraph: I help [audience] with [services] so they can [outcome].
I'll find leads through [three sources]. The safe next step is [...], tracked in [...].

WHERE THIS GOES NEXT *Every channel lesson in this module — Lessons 2 through 8 — works inside this foundation. The safe next step matters from first contact: a discovery call or simple reply, never passwords or private files before an agreement.*

REVISED date _____ what changed _____

My Network Map and Warm Outreach

PART 14 — MARKETING AND FINDING CLIENTS

Start where trust already exists. Map your network instead of blasting it; keep the ask small and respectful. Don't make friends and family responsible for your business.

Contact	Category	Purpose of message	Small, specific ask

Draft one message — six parts: genuine opening, what I do now, who I help + the problem, a small ask, an easy out, a thank-you:

WHERE THIS GOES NEXT *Categories to consider: former coworker, prior manager, local business owner, adjacent service provider, close contact, online professional. Follow-up gets tracked in the system from Lesson 8.*

REVISED date _____ what changed _____

My Local and Research Conversation Plan

PART 14 — MARKETING AND FINDING CLIENTS

Listen before you pitch. Conversations are worth more for what you learn than for any immediate sale. Ask neutral questions that reveal real problems; listen for patterns, not one opinion.

Field	My plan
Conversation target list	
Target categories	
Research purpose (what I want to learn)	
Neutral questions that reveal problems	
Boundary statement (stay out of pitch mode)	
Note method (useful, but no sensitive private info)	
Follow-up plan (whether or not there's a lead)	

WHERE THIS GOES NEXT *What you learn here sharpens your offer and feeds your lead tracker. When a conversation turns toward an engagement, name it gently and move to a discovery call — don't improvise scope on the spot.*

REVISED date _____ what changed _____

My LinkedIn Plan

PART 14 — MARKETING AND FINDING CLIENTS

Relationships, not volume. Connect with relevance, contribute helpfully, and never pitch the moment someone accepts. Cold-spam behavior damages your reputation faster than it produces a client.

Field	My plan
Two profile updates that sharpen my offer	
Five post or conversation types where I can contribute helpfully	
Two relevant connection targets or categories	
One practical post draft tied to a service I offer	
One rule for what I will NOT do (no connection spam, no instant pitch)	
Where LinkedIn leads, referrals, and follow-up dates are recorded	

WHERE THIS GOES NEXT *This becomes one block of your weekly routine in Lesson 8. Stay alert to safety red flags — messages pushing you off-platform fast, offers too good to be true, or requests for money or documents.*

REVISED date _____ what changed _____

My Community Evaluation

PART 14 — MARKETING AND FINDING CLIENTS

Visibility is not intrusion. Choose communities intentionally, read the rules, observe the culture before posting, and contribute helpfully without giving unlimited free consulting.

Field	Group 1	Group 2	Group 3
Audience fit			
Promotion rules			
Group culture			
How I'll contribute helpfully			
My direct-message boundary			

WHERE THIS GOES NEXT *Pick the one or two groups worth your consistent participation rather than spreading thin. An unsolicited sales DM to someone who asked a question is rarely welcome and often against the rules.*

REVISED date _____ what changed _____

My Inquiry and Referral Process

PART 14 — MARKETING AND FINDING CLIENTS

Give interest somewhere to go. One simple path from first contact to discovery call, the same for everyone. Collect only what you need to respond; refuse sensitive info before an agreement.

Field	My answer
The inquiry path from first contact to discovery call	
Where leads will be tracked	
Minimum lead-capture fields	
How often inquiry channels are checked	
Follow-up rule for unclear or unanswered inquiries	
Privacy-safe thank-you process for referral sources	

Standard first response for a website inquiry:

My Inquiry and Referral Process — continued

Standard first response for a referral:

The one sentence telling prospects not to send passwords, private files, or sensitive records yet:

WHERE THIS GOES NEXT *Lesson 8 tracks everything this brings in. Respond to referrals promptly and thank the source in a way that respects everyone's privacy — a referral source treated well refers again.*

REVISED date _____ what changed _____

My Opportunity Review (Scam Check)

PART 14 — MARKETING AND FINDING CLIENTS

New VAs are targeted by scams. Use stop, verify, decide. A legitimate client hires you to do work and pays you; a scam maneuvers you into moving money or handing over information.

Field	My answer
Opportunity source and how I found it	
Company or client name, exactly as provided	
What can be independently verified (company, person, domain, role)?	
Red flags present (high pay, vague duties, urgency, money movement, document requests)	
What information or money does it ask of me?	
Classification: likely safe to respond / needs more verification / decline	
One sentence explaining the decision	
Recorded in my lead tracker? (Y/N)	

WHERE THIS GOES NEXT *Never spend your own money to get a job, accept or forward funds for someone, or hand identity documents to an unverified party. If you already engaged and it looks wrong: stop, don't send money or documents, preserve the messages, and seek appropriate help.*

REVISED date _____ what changed _____

My Lead Tracker and Weekly Routine

PART 14 — MARKETING AND FINDING CLIENTS

A lead you don't track is a lead you'll lose. The Module 10 lead tracker goes live here. Following up is not harassment; following up four times in a week is. Measure channels, not activity.

Tracker setup	My setup
Tracking tool (spreadsheet, CRM, or other)	
Minimum fields (date, name/company, contact, source, status, next action, follow-up date)	
Status flow for the next 30 days	
Two or three lead sources to focus on this month	

My Lead Tracker and Weekly Routine — continued

Weekly block	When / details
Follow-up block 1	
Follow-up block 2	
Weekly lead-review block	
Visibility block(s) per chosen channel	

Polite follow-up rule (after no response), close-out rule (when to stop), and my 30-day review date — what to repeat, pause, or drop:

WHERE THIS GOES NEXT *This is the engine that runs every channel in this module. The next action with a date is the field that keeps a warm lead from going cold while you wait to 'find time.'*

REVISED date _____ what changed _____

My Discovery Call Purpose Statement

PART 15 — THE DISCOVERY CALL

A discovery call is a fit diagnosis, not a sales performance. This statement is your personal guide — built on three commitments: understand the problem, decide fit honestly, choose the next step.

My discovery call purpose statement (understand the problem before recommending; evaluate fit honestly; end with a clear next step; no overpromising, pressure, or unpaid work on the call):

The four possible outcomes — my note on each	When I'll use it
Move to proposal	
Request more information	
Nurture and follow up later	
Politely decline or refer out	

WHERE THIS GOES NEXT *This opens the discovery-call packet that Lessons 2 through 8 assemble. The goal is never to close everyone — it's to make the correct next-step decision based on what you learned.*

REVISED date _____ what changed _____

My Pre-Call Preparation Checklist

PART 15 — THE DISCOVERY CALL

Prepared, not over-prepared. Gather enough context to ask sharp questions — but don't audit their setup or build the plan in advance. That's unpaid consulting dressed up as diligence.

✓	What I know going in	My notes
☐	Prospect name, business, and contact information	
☐	How the prospect found or contacted me	
☐	The problem or request they stated	
☐	Business basics (industry, services, customers)	
☐	Public website or profile notes	
☐	Possible tools, systems, or workflows involved	

My Pre-Call Preparation Checklist — continued

Facts observed	Assumptions to verify	Questions to ask

Early read — possible fit, possible concerns, and next-step options:

WHERE THIS GOES NEXT *This checklist is part of the discovery-call packet. Keep research proportionate: enough to be sharp, not so much that you've done the job for free.*

REVISED date _____ what changed _____

My Pre-Call Questionnaire

PART 15 — THE DISCOVERY CALL

Short by design — not an intake form. Enough to start the call further along and gently filter. Don't ask for passwords, access, or sensitive records at this stage.

Field	My question wording
Basic contact information	
Business name and type of business	
Type of support being considered	
Main problem or challenge	
One-time, ongoing, or uncertain need?	
Desired start timeline	
Optional budget or support-level question	
Open note field (anything else to share)	

My Pre-Call Questionnaire — continued

Four tests for every question — do I need it before the call, is it clear, could it wait, does it ask for sensitive information too early?

WHERE THIS GOES NEXT *This questionnaire is part of the discovery-call packet. A short, respectful questionnaire makes you look organized; a long or intrusive one makes you look like work.*

REVISED date _____ what changed _____

My Discovery Call Agenda and Opening

PART 15 — THE DISCOVERY CALL

An agenda, not a script. Set the frame in the first minute, then let the prospect do most of the talking. You steer with questions; they fill the time.

Agenda step	My notes
Welcome and time check	
Purpose of the call	
Brief explanation of the structure	
Permission to take notes	
First discovery question	
Time for the prospect's questions	
Summary and next step	

My opening, in my own words (welcome, time check, purpose, structure preview, note-taking permission):

WHERE THIS GOES NEXT Practice the opening aloud — it's the part most worth having ready. Keep control without dominating: aim to listen far more than you talk.

REVISED date _____ what changed _____

My Discovery Question Bank

PART 15 — THE DISCOVERY CALL

Questions are the whole skill. Cover pain, goals, timeline, and fit — with open-ended, clarifying, and follow-up questions. Listen and summarize before you recommend.

Question area	My questions (at least three each)
Pain points (what isn't working, what it costs)	
Goals & success (what 'better' looks like)	
Timeline, priority & urgency	
Fit, budget & decision process	
Clarifying & follow-up phrases	

WHERE THIS GOES NEXT *Keep this a living list, refined after each call. The answers feed the fit decision in Lesson 6. Most overpromising traces back to assuming instead of asking one more question.*

REVISED date _____ what changed _____

My Fit Decision Checklist

PART 15 — THE DISCOVERY CALL

Turn the questions into a decision, using your Module 9 fit guide. Discuss budget plainly, without apology. Saying no to a poor fit is a boundary decision, not a lost sale.

✓	Fit dimension	My assessment
☐	Service / package fit	
☐	Budget fit	
☐	Timeline and availability fit	
☐	Skill and scope fit	
☐	Communication and boundary fit	
☐	Decision-maker and next-step clarity	
☐	Red flags and yellow flags	
☐	Final verdict: good fit / not ready / not a fit / future fit	

My Fit Decision Checklist — continued

Revision log — pencil, not ink

Revisions are expected progress. When research, an advisor, or a later lesson changes your answer, update this sheet and log it here — drafts in pencil, not ink.

Date	What changed	Why

WHERE THIS GOES NEXT *When the answer is no, respond calmly and kindly — a brief honest 'I'm not the right fit, but here's a direction' protects your reputation. A controlling or boundary-resistant prospect is a no regardless of the money.*

My Objection Response Guide

PART 15 — THE DISCOVERY CALL

An objection is a question in disguise, not a rejection. Panic-discounting trains the client to see your rate as soft. Reduce scope before reducing price.

Objection	My calm response (no panic discount)
"That is too expensive."	
"Can you do it cheaper?"	
"I need to think about it."	
"I found someone cheaper."	
"I'm not sure I need this yet."	
"I need to ask someone else."	
"Can we skip the contract?"	
"Can you do a quick unpaid sample or trial?"	

WHERE THIS GOES NEXT *If the package is more than they'll spend, offer a smaller package or starter project — that keeps your rate intact. Know which objections are simply a no: endless negotiation, skipping the contract, or pressure for free trial work.*

REVISED date _____ what changed _____

My Follow-Up and Closing Checklist

PART 15 — THE DISCOVERY CALL

Close the loop every time. The post-call summary is the highest-leverage habit here. A clean no, well recorded, beats a messy maybe you keep chasing.

✓	Step	My version
☐	Post-call summary (same day or next business morning)	
☐	First follow-up if no response	
☐	Second follow-up if needed	
☐	Final close-the-loop message	
☐	Rule for when to stop active follow-up	
☐	Rule for a future reminder instead of closing	

My post-call summary template (what I heard, the recommended next step, the timing):

WHERE THIS GOES NEXT A 'yes' hands straight to the Module 11 pipeline — proposal, contract, invoice, then the Module 12 start gate, in order. Record every outcome in your lead tracker as closed won, closed lost, or no response.

REVISED date _____ what changed _____

My Client Management Principles

PART 16 — MANAGING ACTIVE CLIENTS

Client management is an operating discipline, not just being helpful. Helpful is not unlimited. These principles are your internal guide for updates, scope responses, payment reminders, and offboarding.

My 6–10 client management principles, in plain language (clear communication, no work without information/access/agreement/payment, one task system, clarify priorities, protect scope with options, document decisions, respect without accepting disrespect, reset or offboard when needed):

WHERE THIS GOES NEXT *These guide the rest of Module 16. The operating rule underneath them all: manage the relationship before the relationship manages you.*

REVISED date _____ what changed _____

My Weekly Client Update Template

PART 16 — MANAGING ACTIVE CLIENTS

A control point, not a chore. A steady update shows progress, surfaces what you need, and prevents the anxious 'any progress?' message. Report blockers as facts, not accusations.

Update section	This week's entry
Overall status	
Completed this week	
In progress / next priorities	
Waiting on the client	
Hours or package note (if applicable)	
Risks, blockers, or changes	
Next update or next step	
Channel I'll send this through	

WHERE THIS GOES NEXT *This becomes a reusable template you fill in each week. Consistency matters more than polish — an update that arrives every week beats a brilliant one that arrives sometimes.*

REVISED date _____ what changed _____

My Monthly Client Summary Template

PART 16 — MANAGING ACTIVE CLIENTS

Time tracked is value made visible. Once a month, step back and give the client the fuller picture. The patterns and recommendation are what make you a partner, not just a task-doer.

Summary section	This month's entry
Overall status	
Work completed	
Hours used and hours remaining	
Open items / waiting items	
Patterns noticed	
Recommendation for next month	
Client decisions needed	
Next step	

WHERE THIS GOES NEXT *This is a live retention tool, not a report nobody reads. Write time entries specific enough to summarize here — 'sorted inbox, flagged 6 urgent messages' beats 'email, 30 min.'*

REVISED date _____ what changed _____

My Active-Client Task Intake and Prioritization

PART 16 — MANAGING ACTIVE CLIENTS

Intake before prioritization. A request isn't ready to work until it's complete; one place captures them all. Not everything can be first — confirm the real priority before guessing.

Field	My answer
Where new requests should be sent or captured	
What outcome the client wants	
Due date and the reason for the deadline	
Files, links, examples, access, or approvals needed	
Inside the current scope and package?	
Estimated size (small / medium / large)	
Priority category (do now / do next / routine / waiting / backlog / decline)	
Who owns the next action (me or the client)	
Where the status will be updated	
How priority conflicts will be confirmed with the client	

WHERE THIS GOES NEXT *This is the live successor to the task system from Module 12, Lesson 6. When a client sends a pile of tasks, capture them all and ask which is most important this week — don't silently start with the easiest.*

REVISED date _____ what changed _____

My Delay and Urgent-Request Response Language

PART 16 — MANAGING ACTIVE CLIENTS

Turnaround depends on complete inputs. Document blockers without blame; the timeline restarts when you have what you need. Urgent is not the same as emergency — screen it before you scramble.

Situation	My calm response
A task is missing the final file	
I don't have account access	
The client hasn't approved the previous step	
A deadline must move because info arrived late	
A client asks for same-day turnaround	
An urgent request conflicts with scheduled work	
A client says 'urgent' but states no deadline	
A request is both urgent AND out of scope	

WHERE THIS GOES NEXT *Having the words ready is what keeps these moments calm. This is the client-delay rule from Module 9 doing its job: a slow client response shouldn't silently become your missed deadline.*

REVISED date _____ what changed _____

My Boundary Reset Scripts

PART 16 — MANAGING ACTIVE CLIENTS

Scope creep is the slow drift of small asks. Reset boundaries the same way every time — calmly, with options, not arguments. Offer choices that keep the client in control of their own priorities.

Reset step	In scope, over hours	Related — quote separately	Decline — out of scope
Acknowledge the request			
Name the scope issue			
Explain the impact			
Offer options			
Confirm before acting			

WHERE THIS GOES NEXT *Avoid the two failure modes: silently absorbing the work (which trains more of it) and arguing whether it 'should' count (which makes it personal). Options, not arguments.*

REVISED date _____ what changed _____

My Late-Payment and Work-Pause Procedure

PART 16 — MANAGING ACTIVE CLIENTS

Enforce the rule you already wrote. A payment foundation must exist first. The work pause is the boundary that keeps you from working unpaid indefinitely. Never improvise fees or threats; document everything.

Field	My version
Invoice-due rule	
Reminder schedule (reminder 1, reminder 2, formal notice)	
Reminder content (invoice #, amount, due date, link, status request)	
Work-pause trigger	
Definition of paused work	
Restart rule	
Documentation rule	
Escalation rule (follow agreement; seek guidance before collections/legal/write-off/offboarding)	

WHERE THIS GOES NEXT *This is the active-client enforcement of the payment rule from Modules 9 and 11. A genuinely disputed invoice is handled with facts and records; silent nonpayment follows the escalation.*

REVISED date _____ what changed _____

My Offboarding Kit

PART 16 — MANAGING ACTIVE CLIENTS

Every relationship ends — plan the ending before you need it. A clean offboarding is the mirror of onboarding, and a good ending is where the next clients come from.

Offboarding step	Done?	Notes
WORK — finish or formally hand off open tasks		
WORK — deliver final files; confirm nothing dangling		
ACCESS — remove or return logins and permissions		
RECORDS — archive contracts, invoices, deliverables		
COMMUNICATION — send a clear, warm closing message		

Testimonial request — my timing rule and the wording I'll use (with permission to use words and name):

My Offboarding Kit — continued

Referral request — the client type and problem I want more of, in plain language:

Decision	My answer
Notice and termination terms my service uses	
Final-payment terms at offboarding	
How long I retain archived client records and contracts	

WHERE THIS GOES NEXT Testimonials feed your Module 13 credibility assets; referrals feed your Module 14 pipeline — so the business compounds rather than starting over with each client. Not every ending is friendly: follow the agreement, keep the records, stay professional.

REVISED date _____ what changed _____

My Monthly Review Structure

PART 17 — REVIEWING THE BUSINESS

Growth multiplies whatever is already happening — so review before you expand. Run on evidence, not emotion. Keep it short enough that you'll actually do it: 30-60 minutes, once a month.

Setup item	My plan
My fixed monthly review day	
Where review notes are stored	
Data sources I'll check each month	
Decision limit (no more than three changes)	
Follow-up (check last month's changes)	

My five monthly review questions (e.g., what worked? what created friction? what was profitable? what needs clarifying? what should change next month?):

WHERE THIS GOES NEXT Lessons 2 through 7 fill this structure: the data checklist, then profitability, client fit, service decisions, revisions, and rates. The standing question: based on actual work, what should I keep, stop, clarify, simplify, or charge differently?

REVISED date _____ what changed _____

My Data Tracking Checklist

PART 17 — REVIEWING THE BUSINESS

Track only data you'll actually use to make a decision — don't over-instrument. Track time close to the work, including the non-billable hours that quietly destroy a package's profitability.

Tracking area	What I'll record	Where / how I track it
Money	Revenue received, unpaid invoices, expenses, payment fees, tax reserve	
Time	Billable hours, non-billable time, over-servicing, package hours used	
Tasks	Recurring task types, estimated vs. actual time, unclear/out-of-scope requests	
Clients	Responsiveness, payment behavior, communication patterns, boundary issues	
Delivery	Deadlines met, rework, errors, praise, complaints, process gaps	
Pipeline	Lead source, discovery calls, proposals, close/lost reasons, follow-ups	
Capacity	Workload level, schedule pressure, overload signs, sustainability	
Tools	Tools used, tools ignored, manual workarounds, access/workflow	

WHERE THIS GOES NEXT *This checklist is what you 'collect' at the start of every monthly review. Keep each line to what you'll genuinely use — elaborate tracking you abandon is worse than a simple habit you keep.*

REVISED date _____ what changed _____

My Package Profitability Worksheet

PART 17 — REVIEWING THE BUSINESS

A profitable package protects money and capacity. Effective hourly value = net revenue ÷ ALL package time, including unbilled hours. A happy client won't pay your taxes — check the math.

Worksheet section	My records
Package name, client, month, price	
Money: invoiced, paid, direct costs, fees, refunds/credits, net revenue	
Time: work, communication, setup, rework, reporting, over-serviced	
Effective hourly value (net revenue ÷ total time)	
Scope notes (out-of-scope, urgent, unclear, revisions, missing client inputs)	
Client-fit notes (payment, communication, boundaries, value perception)	
Decision: keep / revise / pause / remove	
Next action (one change before it's sold or renewed again)	

WHERE THIS GOES NEXT *Its results feed the package revisions in Lesson 6. 'Revise' is usually the right answer for a fine price bleeding time to vague scope — the fix is clarity, not abandonment.*

REVISED date _____ what changed _____

My Client-Fit and Concentration Analysis

PART 17 — REVIEWING THE BUSINESS

The same dollar costs different amounts depending on who it comes from. Watch concentration risk — if one client is a large share of revenue or hours, their departure becomes your emergency.

Worksheet section	My records
Client profile (name, business, package, start date, services)	
Revenue & time (monthly revenue, hours, effective hourly value, % of total)	
Payment review (on-time, late, friction, discount pressure)	
Communication review (clarity, responsiveness, tone, approval speed)	
Scope review (out-of-scope, urgency, revisions, boundary resets)	
Work-fit review (needs match my services, tools, skill, workflow?)	
Concentration review (% of revenue and capacity; dependency risk)	
Decision: keep / reset / restructure / reduce dependency / offboard	
Next action (improve relationship, reduce risk, protect capacity)	

WHERE THIS GOES NEXT *These calls connect to the service and package decisions in Lessons 5 and 6. Parting with a poor-fit client isn't failure — it frees capacity for a better one.*

REVISED date _____ what changed _____

My Service Decisions Worksheet

PART 17 — REVIEWING THE BUSINESS

Service refinement is pruning — cut what drains the business so what remains can thrive. A focused menu of services you do well and profitably beats a long list with a few quiet drains.

Worksheet section	My records
Service name	
Where it appears (website, proposal, package, add-on, informal extra)	
Demand evidence (requested, renewed, praised, questioned, ignored)	
Profitability evidence (revenue, hours, hidden time, tool cost, EHV)	
Delivery evidence (repeatability, SOP, task clarity, skill fit, bottlenecks)	
Scope evidence (included, excluded, confusion, what needs a separate quote)	
Client-fit evidence (good-fit value it, or poor-fit request it?)	
Decision: keep / revise / convert to add-on or project / pause / remove	
Next action (one update to menu, package, process, or language)	

WHERE THIS GOES NEXT This feeds the revisions in Lesson 6. Convert a service that doesn't fit a recurring package into a clearly-scoped add-on or project (the Module 9 distinction).

REVISED date _____ what changed _____

My Revision Worksheet

PART 17 — REVIEWING THE BUSINESS

Revise the operating system, not just the offer. A revision often spans three layers — package language, boundaries/process, and tools/access. Keep every client-facing document consistent.

Worksheet section	My records
Package or service being revised	
Evidence from review (time, profitability, fit, scope, delays, tool friction)	
Problem category (language / boundary-process / tool-access / fit / skill / pricing)	
Current wording or process	
Revised wording or process	
Materials to update (website, menu, proposal, contract, invoice, onboarding, CRM, folder)	
Tool affected	
Tool decision (keep / configure / simplify / consolidate / replace / cancel / later)	
Client communication needed (notice, renewal update, boundary reset, none yet)	
Review date (check whether the revision worked)	

My Revision Worksheet — continued

WHERE THIS GOES NEXT *When you change a package, change every place it lives — or you create the contradiction Module 11 warned about. Don't ambush current clients: notice now, or new terms at renewal.*

REVISED date _____ what changed _____

My Rate-Increase Plan

PART 17 — REVIEWING THE BUSINESS

Raise rates with evidence, not panic. New-client pricing and existing-client pricing are separate decisions — raise for new prospects now; give current clients notice, an effective date, and options.

Plan section	My records
Current rate or package price	
Proposed new rate or price	
Evidence for the change (profitability, time-per-task, scope, costs, demand, intro ending)	
Affected clients (new, all current, selected, legacy, project, renewal)	
Effective date (specific date or renewal point)	
Notice period (and any contract-required notice)	
Client options (continue, reduce scope, change package, review call, renew early, offboard)	
Documents to update	
Communication method (email, review call + written confirmation, renewal, amendment)	
Follow-up task (confirm acceptance, update invoice, send amendment, offboard if needed)	

My Rate-Increase Plan — continued

My rate-increase notice — short, professional, stating the new price plainly with notice and clear options:

WHERE THIS GOES NEXT *This is the optimize-then-grow move the whole module was building toward. Fix the inefficient delivery model AND the rate together — don't just charge more for the same leaky package.*

REVISED date _____ what changed _____

My Specialization Readiness Checklist

PART 18 — GROWTH AND THE LONG TERM

Specialize from proof, not pressure. Complete this honestly before changing your website, menu, pricing, or positioning. A low score means keep building evidence — not specialize.

✓	Readiness item	Yes / No
☐	I can name the specific client problem this specialty solves	
☐	I have seen this problem in real client work or discovery calls	
☐	More than one prospect or client has mentioned it	
☐	I can deliver the work at a professional level without overpromising	
☐	I have tracked how long this work takes	
☐	I understand what buyers currently do instead of hiring me	
☐	I know where this type of client can be found	
☐	The work can be priced profitably	
☐	The work fits my capacity and work style	
☐	I can describe the outcome in plain language	
☐	I can create or improve an SOP / repeatable process for it	
☐	It doesn't depend too heavily on one unstable tool or trend	
☐	I can test the specialty before changing the whole business	

My Specialization Readiness Checklist — continued

✓	Readiness item	Yes / No
☐	I know which services I'd keep, pause, or remove if it proves viable	

Score and decision — 0–5 Yes: don't specialize yet. 6–10: test quietly (one offer/sample/angle). 11–14: ready for stronger positioning in Lessons 2–3. My next step:

WHERE THIS GOES NEXT *This feeds the specialization comparison in Lesson 2. Specialize from your own delivery data — repeated demand, profitable packages, strong outcomes — not from a niche that sounds impressive.*

REVISED date _____ what changed _____

My Specialization Comparison

PART 18 — GROWTH AND THE LONG TERM

Two ways to narrow: by what you do (service) or who you serve (industry). The strongest is often blended — one service focus for one client group. Choose deliberately, from evidence.

Field	My notes
Possible service specialty	
Evidence for service demand	
My service capability level now	
Possible industry specialty	
Evidence for industry demand	
What I understand / must still learn about the group	
Possible blended specialty ('I help [group] with [service/outcome]')	
Market access (where I'll find this group)	
Pricing and profitability fit	
Risks and boundaries (privacy, compliance, insurance, access, capability)	
Small testing step before a major change	
Current decision (stay general / test service / test industry / test blended)	

My Specialization Comparison — continued

WHERE THIS GOES NEXT *Whichever direction you choose shapes the signature system in Lesson 3. A specialty is a strategic focus for a defined period — commit, review against evidence, adjust.*

REVISED date _____ what changed _____

My Signature System Outline

PART 18 — GROWTH AND THE LONG TERM

Productize what you already do well. A signature system is your repeatable method for solving a specific problem — named only when you've actually delivered it repeatedly.

Field	My notes
The recurring problem it solves	
Evidence I've delivered this repeatedly (clients, results)	
Building blocks — the phases from intake to handoff	
Templates, checklists, or SOPs it uses	
Quality checkpoints in the method	
The result it reliably produces	
A plain, non-hyped name that describes the value	

WHERE THIS GOES NEXT *This outline is the raw material for the premium package in Lesson 4 and, later, anything you delegate. A system named before you've delivered it is marketing fiction — clients can tell.*

REVISED date _____ what changed _____

My Premium Package Draft

PART 18 — GROWTH AND THE LONG TERM

Premium follows proof. What makes an offer premium is a clearer outcome, a defined process, and reduced client risk — rarely just more hours. Build the boundaries before the marketing.

Field	My draft
Package name (clear, no hype)	
Target client and problem	
Why it's higher value than the starter/core offer	
Included deliverables (outputs, meetings, reports, support)	
Process phases (intake to handoff or monthly review)	
Client responsibilities (access, decisions, files, approvals)	
Exclusions (and what needs a separate quote or advisor)	
Turnaround and response standards	
Price or price range (value, cost, capacity, market fit)	
Proof still needed before marketing widely	

WHERE THIS GOES NEXT From here it joins your package ladder — a starter/core offer and a premium one, so clients choose the level that fits. Premium pricing without premium delivery is the fastest path to a refund.

REVISED date _____ what changed _____

My Subcontractor Readiness Checklist

PART 18 — GROWTH AND THE LONG TERM

Busy is not ready. Don't hire help to carry a broken system — document first, delegate second. Check the margin, and take the classification question to a professional.

✓	Field	My notes
☐	Task or service considered (specific, not 'admin help')	
☐	Reason for subcontracting	
☐	Demand evidence (completed work, repeated requests, package data)	
☐	Process documentation available (SOP, checklist, template, brief)	
☐	Scope boundaries (included, excluded, outside their authority)	
☐	Client permission (agreement allows subcontractors / approval needed)	
☐	Classification review needed (IRS, DOL, state, professional guidance)	
☐	Subcontractor agreement needs (confidentiality, payment, work product, termination, contact limits)	
☐	Security and access plan (files, systems, passwords, MFA, limits, offboarding)	
☐	Quality control plan (how I'll review before the client sees it)	
☐	Margin check (subcontractor cost + my review time + fees vs. client price)	
☐	Decision (ready to test / not yet / do not subcontract this)	

My Subcontractor Readiness Checklist — continued

WHERE THIS GOES NEXT *This feeds the agreement and access checklist in Lesson 6. If the margin is thin or negative once your review time is counted, delegating that task makes you busier and poorer, not freer.*

REVISED date _____ what changed _____

My Subcontractor Agreement and Access Checklist

PART 18 — GROWTH AND THE LONG TERM

A verbal arrangement isn't enough. Confirm client permission first. Give less access, not more — separate accounts, password manager, MFA, no shared passwords where possible.

✓	Field	My notes
☐	Task being considered	
☐	Client permission status (allowed / approval required / prohibited / unclear)	
☐	Professional review needed (legal, tax, employment, insurance, privacy, other)	
☐	Agreement topics (scope, payment, confidentiality, data, client contact, work product, termination, offboarding)	
☐	Confidential information involved	
☐	Access required (specific folders, systems, roles, permission levels)	
☐	Access NOT required (must not receive)	
☐	Password and MFA plan (separate user, delegated access, manager sharing)	
☐	Tool restrictions (AI tools, personal devices, downloads, storage)	

My Subcontractor Agreement and Access Checklist — continued

✓	Field	My notes
☐	Task brief and SOP (instructions, examples, deadline, review, escalation)	
☐	Quality review process (before the client sees it)	
☐	Offboarding process (return/delete files, revoke access, update log, rotate passwords, final invoice)	

WHERE THIS GOES NEXT This feeds the quality-control and oversight worksheet in Lesson 7. Delegating against your client agreement's terms is a serious breach — check permission before anything else.

REVISED date _____ what changed _____

My Quality Control and Margin Worksheet

PART 18 — GROWTH AND THE LONG TERM

Delegation is not abdication — your name is on the result. Define acceptance criteria before assigning. Oversee without employee-style control. Confirm the margin survives your review time.

Field	My notes
Task or deliverable	
Client agreement status (allowed / approval required / prohibited / unclear)	
Acceptance criteria (what complete, accurate, client-ready means)	
Files / systems needed (only what's required)	
Quality-assurance setup (brief, SOP, examples, tool rules, deadline, escalation)	
First-sample review point	
Midpoint review point	
Final quality check before client delivery	
Who delivers to the client	
Subcontractor cost estimate	
My oversight estimate (review, correction, communication, admin time)	
Other costs (software, payment, access, rework allowance) and remaining margin	

My Quality Control and Margin Worksheet — continued

WHERE THIS GOES NEXT *If a subcontractor needs so much fixing that your oversight time erases the margin, the arrangement isn't working. You set outcome, standards, and deadline — not their hours and methods.*

REVISED date _____ what changed _____

My Annual Maintenance and Compliance Review

PART 18 — GROWTH AND THE LONG TERM

The yearly once-over that catches what monthly reviews miss. This is the checklist Module 7 first seeded — run it every year. Verify changing rules (like BOI/FinCEN) at the official source.

Category	Review items	Action needed / notes
Entity & registration	Good standing, annual report, registered agent, address, DBA, domain renewal	
Licenses & permits	Federal, state, county, city, industry; renewal dates; fees; official links	
Tax & accounting	Income, expenses, estimated taxes, W-9/1099, retention, tax-preparer questions	
Insurance & risk	General/professional/cyber/home-based; subcontractor impact; certificates	
Contracts & policies	Proposal, agreement, invoice terms, late-payment, AI-use, data handling, subcontractor terms	
Security & access	Password manager, MFA, backups, shared folders, client/vendor/subcontractor	
Tools & subscriptions	Accounting, CRM, email, PM, storage, e-sign, website, phone; unused/duplicate tools	
Business model	Rates, packages, capacity, client concentration, specialty evidence, next-year priorities	

My Annual Maintenance and Compliance Review — continued

WHERE THIS GOES NEXT *Run this every year for the life of the business. The failures here are quiet until they're urgent — a lapsed registration found at the bank, an insurance gap found after a claim.*

REVISED date _____ what changed _____

My Business Continuity and Long-Term Plan

PART 18 — GROWTH AND THE LONG TERM

A solo business has a single point of failure: you. Plan the business without you while everything is calm. The long-term direction is genuinely yours to choose — you built something that gives you the choice.

Section	My record
Current business status (services, clients, packages, revenue, largest client %, workload)	
Critical accounts and tools (email, domain, storage, CRM, accounting, password manager, backups)	
Client continuity (contact list, work location, urgent deadlines, templates, pause/reschedule rules)	
Access and security (MFA, recovery methods, password manager location, backup, retention)	
Owner availability plan (planned absence, short emergency, extended emergency, who can notify clients)	
Income stability (business reserve, personal reserve, concentration limit, replacement leads)	
Benefits and protection — questions for professionals (health, disability/life, cyber, retirement)	
Long-term direction (keep small / specialize / subcontract / pause / reduce / close / transfer / sell)	
Professional support (CPA, attorney, insurance agent, financial pro, IT/cyber, mentor)	

My Business Continuity and Long-Term Plan — continued

WHERE THIS GOES NEXT *This protects what you've built — and holds the decision about where it goes next. The benefits, insurance, and retirement lines are questions for licensed professionals, not choices to make alone.*

REVISED date _____ what changed _____