

## CHECKLIST

# BUSINESS DEVELOPMENT PROCESS FOR BOUTIQUE CONSULTANCIES

Different types of consultancies need different sales processes depending on:

- i. the size of their potential market
- ii. the value of their average project
- iii. the extent of personalisation in their service
- iv. the buying preferences of their prospects.

Use this generic template to create a check-list for your firm.

### POSITIONING YOUR FIRM TO SELL HIGH-VALUE SERVICES.

- Put strategies in place to avoid becoming a commodified service that is chosen on cost.
- Develop services that solve urgent, big problems that the C-suite prioritise.
- Involve clients and targets as advisors on your major service, branding and go-to-market decisions.

### DEFINE YOUR TARGET MARKET AND IDEAL CLIENT PROFILE (ICP)

- Niche market and buyer profile is clearly defined and on all marketing assets including website
- Create ICPs to drive marketing & sales content (pain points, needs, journey, and decision-making processes).

### DEVELOP A CLEAR VALUE PROPOSITION

- You articulate a compelling value proposition that highlights the important problem(s) you solve.
- Your messaging is client-centric, focusing on benefits and outcomes they need, in their language.

### ESTABLISH A PROACTIVE PROSPECTING APPROACH

- Leverage existing networks and systematically ask for client referrals.
- Position consultants as thought leaders through content marketing and speaking engagements.
- Develop consistent, useful, client-focused content for different stages of the pipeline.
- Plan pursuit of new clients in a structured way (e.g. emails, LinkedIn)

## DESIGN A CONSULTATIVE SALES PROCESS

- Invest time in long-term, trusted relationships with key buyers.
- Conduct discovery sessions to understand client needs and challenges.
- Collateral / Content / Discussion Papers shared during process and treated as ongoing conversations where solutions are co-created during development.

## IMPLEMENT ACCOUNT MANAGEMENT AND EXPANSION TACTICS

- Account management framework created for regular check-ins and value delivery.
- Consultants trained on cross-selling and up-selling techniques within existing accounts.

## LEVERAGE CRM AND INTERNAL SYSTEMS

- Use a CRM system to track BD activities, manage client interactions, and ensure timely follow-ups.
- Develop sales playbooks with best practices, proposal templates, and key messaging.

## FOSTER A BD CULTURE AND SALES ENABLEMENT

- Provide regular training and coaching on BD skills (consultative selling, objection handling).
- Encourage a BD culture where everyone participates in some form of business development activity.
- Share BD successes and failures to foster a learning culture.
- Promote the right skills to help your firm develop its BD focus (acknowledge 'Will' > 'Skill')

## MONITOR AND OPTIMISE THE BD PROCESS

- KPIs that drive sales in the firm are tracked and relevant staff held to account.
- Create a feedback loop with clients to gain insights on what resonates in your BD approach.
- CEO has weekly sales meetings to support sales team and identify improvements.

## SET UP A CLEAR FOLLOW-UP AND NURTURING SYSTEM

- Follow-up process for leads with regular touchpoints established and followed.
- Nurturing strategies to maintain engagement with prospects over longer sales cycles implemented.

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