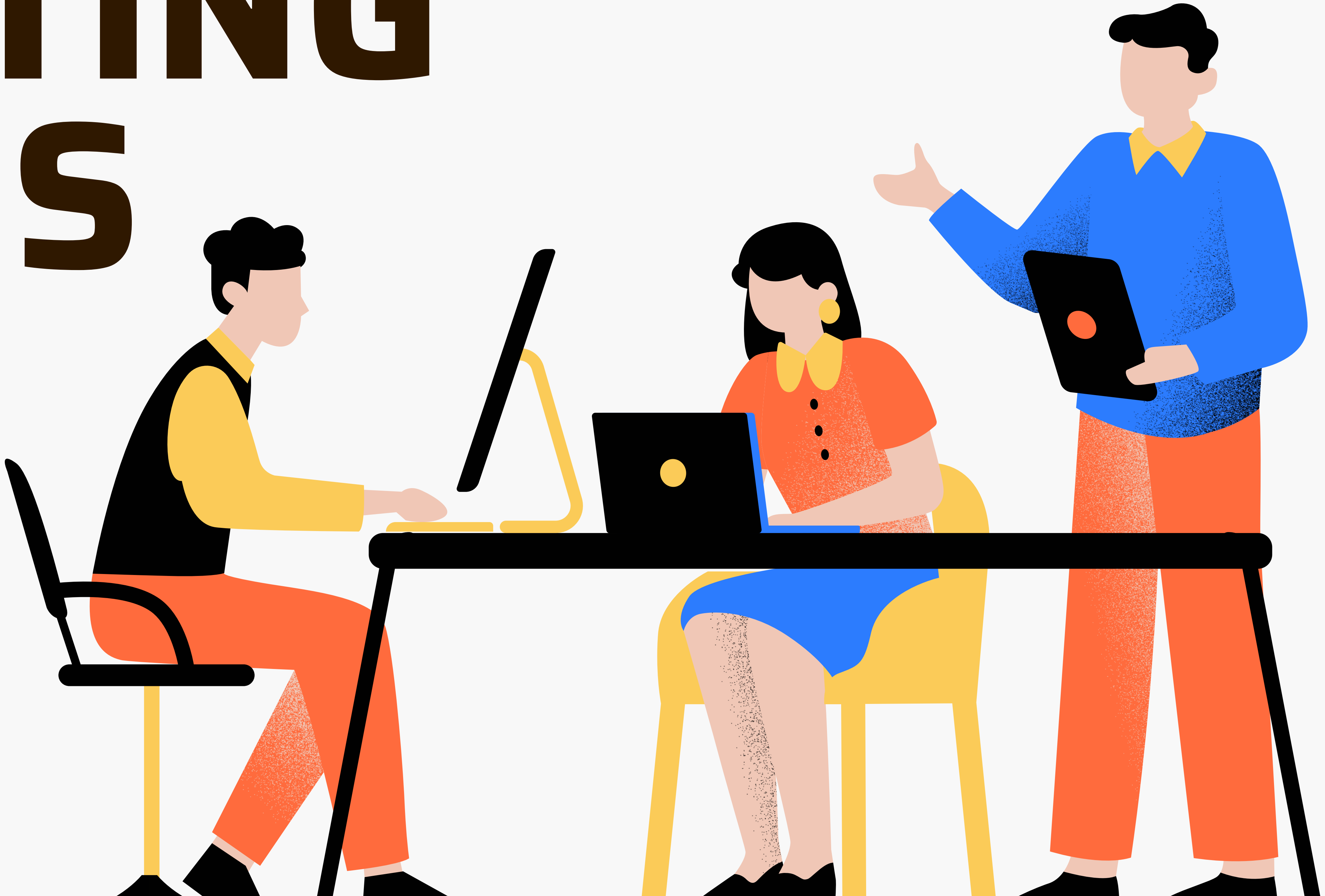
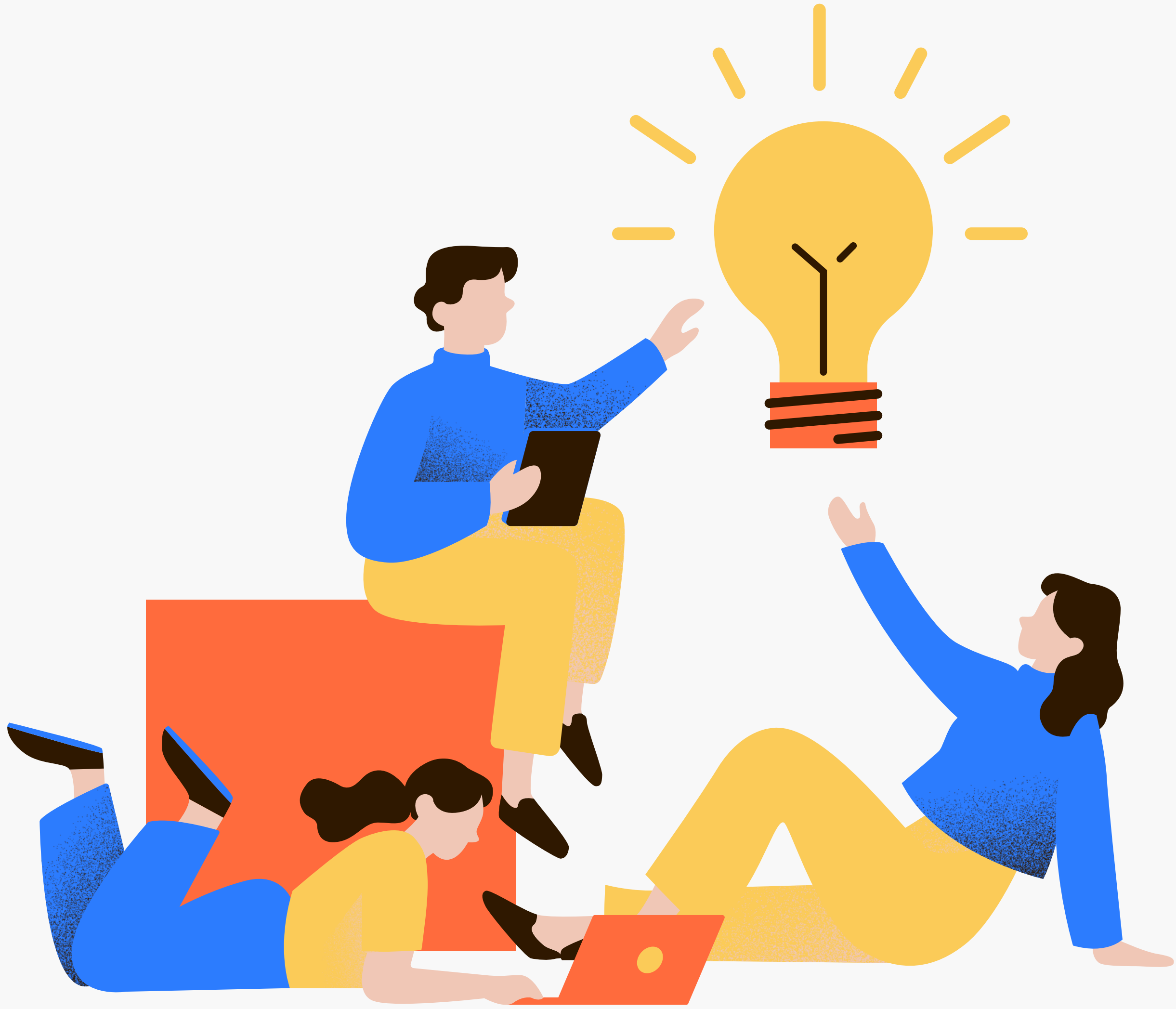
prospecting broker

PACKAGE YOUR CONSULTING SERVICES



STOP BEING THE FREE SAMPLE



There’s a fundamental shift happening in the benefits world — and the brokers who recognize it early will own the next decade.

If you're still giving away free advice, free reviews, free strategy sessions hoping it’ll "lead to something," you're not positioning yourself as an expert. You’re positioning yourself as a free sample. And no one builds a business — or a reputation — handing out free samples to people who were never planning to buy.

And here’s the even harsher reality: information itself isn’t valuable anymore.

Every serious competitor you have already knows the data. They already know the benchmarking numbers. They’ve already gotten through the gatekeeper, pitched your prospect, and probably told them exactly what you would say.

If information alone could close deals, your prospects would’ve already moved.

But they didn’t.

Because information doesn’t drive change — involvement does. And nothing gets a company personally involved faster than writing a check to listen you speak.

The real value you bring is not just knowing what to do, but **actually getting them to do it.**

And by the way, as you're soon going to discover, selling consulting services isn't some hard, uphill battle. It's actually much easier than trying to convince a company to completely transform their healthcare plan after 20 years of buying it the same way.

Consulting is a first step. A low-risk decision. A smart move that says, "Let's diagnose this quietly, get the facts, and see what's possible" — without blowing up relationships, contracts, or internal politics.

You're not asking them to jump off a cliff. You're handing them a flashlight and showing them where the ground actually is.

Even better: the companies that *pay* you for consulting are most likely the companies that will *hire* you full-service if you want them to. Why?

Because they've already written you a check.
They've already justified you internally.
They've already walked into the boardroom and said your name out loud. They've already experienced a win because of you.

Compare that to the ones who nod along through free conversations, take your insights, and then either do nothing or shop you around while you're still busy "building rapport."

The brutal truth is this:

You cannot sell what someone believes they can get for free.
You can't sell strategy. You can't sell time. You can't even sell savings if all you're offering is "let's talk about it."

You have to sell real work.
You have to deliver real outputs.
Something tangible. Something specific.
Something they can physically put in front of a CFO or Controller and say, "Here's why this matters." If you aren't doing that, you're not selling consulting. You're selling hope. And hope is not a scalable sales strategy.

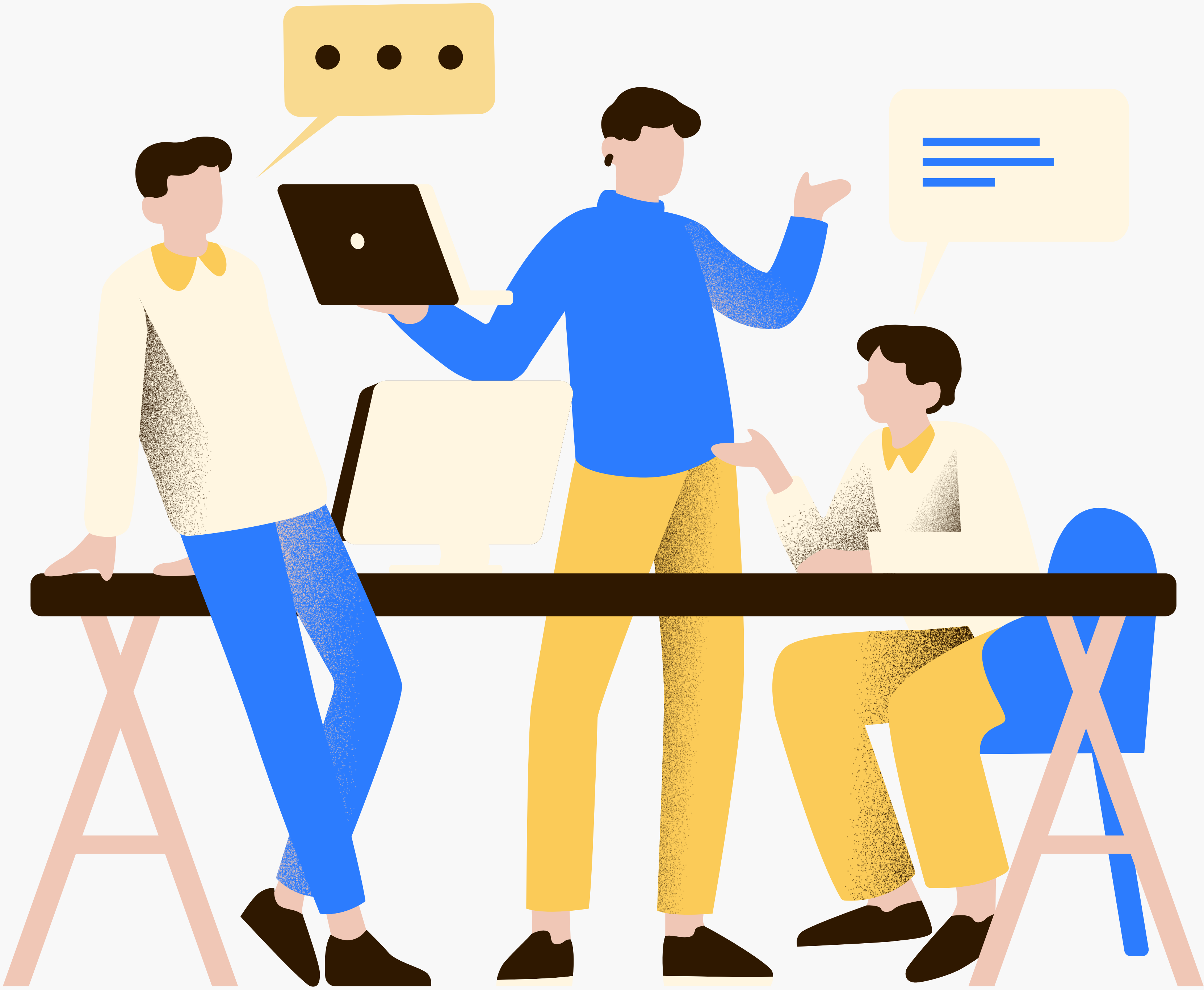
This checklist is designed to make sure you're packaging your consulting services the right way — with clarity, strength, and real-world deliverables that command attention and close deals.

The future belongs to the brokers who stop giving away what they should be getting paid for. And it starts here.

CONSULTING CHECKLIST

I HAVE CRYSTAL CLEAR DELIVERABLES THAT THE CLIENT WILL PHYSICALLY RECEIVE (FILES, REPORTS, DOCUMENTS — NOT JUST "STRATEGY SESSIONS").

When you offer consulting, the first question your prospect will have — whether they say it out loud or not — is “What exactly am I getting?” If you say, “strategy session” or “analysis,” you’re done. Instead, you must be specific. Example: “You will receive a full healthcare cost analysis spreadsheet, a benchmark comparison against three similar-sized companies in your industry, and a 20-page action report.” It’s much easier to justify paying for that than for vague ‘advice.’



[THE OFFER]

THE OFFER DIRECTLY ADDRESSES A BUSINESS PROBLEM OR OPPORTUNITY THAT THE CEO, CFO, CONTROLLER, OR HR CURRENTLY FEELS IS MAKING THEIR JOB HARDER.

Your offer needs to punch a real pain point in the face — one that's actively ruining a CEO's or CFO's day. Saying "we optimize benefits" sounds good at a conference booth but does nothing at a board meeting. Instead, go direct: "Our consulting solves the $500,000 retention problem caused by rising deductibles." If it's not their fire, they won't pay to put it out.

I OUTLINE EXACTLY HOW THIS PROJECT SUPPORTS THE COMPANY'S STRATEGIC CORPORATE GOALS AND LONG-TERM OUTCOMES.

Tie your consulting into their bigger corporate goals like revenue growth, employee retention, or expansion. Example: "Our analysis will show you how to restructure benefits to increase employee satisfaction scores by 18%, directly supporting your 2026 talent acquisition goals." Make your project fit into their bigger playbook, not look like a side quest.

[THE OFFER]

I EXPLAIN WHAT SPECIFIC PROBLEMS THIS CONSULTING WILL SOLVE — NOT VAGUE NONSENSE, BUT REAL ISSUES LIKE "OUT-OF-POCKET COSTS ARE KILLING EMPLOYEE RETENTION."

Nobody is buying “strategic thinking.” They are buying solutions to problems that are actively making them look bad at work. Spell it out. Instead of “optimize plan structures,” say: “We’ll fix the problem of unaffordable high deductibles that’s causing a spike in employee complaints to HR.” Solve a headline problem and you’ll get paid.

OUTCOMES AND RESULTS ARE DEFINED — NOT JUST "WE’LL HAVE A MEETING" BUT "YOU'LL GET A DOCUMENTED BENCHMARKING REPORT AND SAVINGS ROADMAP."

Don’t list your activities; list your outcomes. Instead of saying, “We’ll hold 3 meetings and review plan options,” say, “You’ll have a completed executive summary with three plan redesign options, ranked by potential savings and employee impact.” Busy executives don’t buy Zoom calls; they buy results.

[THE OFFER]

CLIENTS CAN EASILY FIND CLEAR INFORMATION ABOUT MY CONSULTING SERVICES ON MY WEBSITE AND SOCIAL MEDIA PAGES WITHOUT GETTING A MIGRAINE.

When a potential client looks you up (and they will), it should take them less than 30 seconds to figure out what you're selling. If your website and LinkedIn are full of fuzzy terms like "thought leadership" but no clear consulting offer, you're invisible. Example: A services page that says "Healthcare Plan Audit: $3,000 flat fee — Full diagnostic report, 14-day turnaround."

THERE IS AN INTERNAL PITCH KIT READY: A CLEAN LANDING PAGE AND A PDF ONE-PAGER THAT AN EMPLOYEE CAN FORWARD TO THEIR BOSS WITHOUT HAVING TO "EXPLAIN IT."

Give your champions inside the company ammo. Create a sharp internal pitch deck or one-page PDF summarizing your offer, savings potential, and guarantee. Imagine an HR Director forwarding this to the CFO: "Hey, this company guarantees to find us at least $200k in savings or they refund the consulting fee." You just armed your champion with a winning script.

[THE OFFER]

THERE'S A CLEAR, CREDIBLE GUARANTEE — LIKE "IF WE DON'T LOWER YOUR HEALTHCARE COSTS BY AT LEAST X%, YOU GET A FULL REFUND."

A guarantee is rocket fuel — if you structure it right. Instead of "We'll do our best," offer this: "If we don't find at least $100,000 in actionable savings opportunities, your consulting fee is refunded 100%."
Now the CFO doesn't have to worry about explaining a wasted expense to the board.
You removed the political risk.

THE PRICING STRUCTURE IS SIMPLE, LOGICAL, AND SOMETHING A CFO CAN SKIM WHILE HALF-WATCHING CNBC.

Price like a grown-up. No 15-line quotes, no hourly math puzzles. Example: "Healthcare Savings Diagnostic — $5,000 flat fee, paid upfront." Simple pricing gives internal champions a fighting chance to get you approved without sending your offer into corporate purgatory.

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[THE OFFER]

THE BUSINESS CASE IS SO CLEAR THAT EVEN A SLEEP-DEPRIVED HR DIRECTOR CAN EXPLAIN IT TO THEIR CFO WITHOUT BREAKING A SWEAT.

Imagine your buyer explaining your offer at a staff meeting. If they can't do it in one breath, you failed. Example: "We pay $5,000 for a report that shows us how to save $100k+ in healthcare costs, or we get the $5,000 back." If your business case needs an interpreter, it's dead on arrival.

THERE'S A CLEAR AND SIMPLE CALL-TO-ACTION LIKE "BOOK A CALL" — NO TREASURE HUNTS REQUIRED.THE CLIENT CAN BOOK THE FIRST CALL IN THREE STEPS OR LESS .

Call-to-action should be toddler-simple. "Book a 20-minute call" with a button right under your offer. No "contact us for more info" dead ends. Example: Click "Book a Call" ➔ Choose Time ➔ Confirm.

If you make them create an account, answer 10 questions, and take a CAPTCHA test to meet you, you're already forgotten.

[THE OFFER]

I ACCEPT COMMON PAYMENT METHODS LIKE CREDIT CARD, BANK TRANSFER, AND PAYPAL — NO "CARRIER PIGEON WITH A CHECK" SITUATIONS.

Accept payment how they want to pay. Corporate cards, ACH transfers, even PayPal if needed. CFOs have enough hoops to jump through — don't make paying you one of them. Example: A quick invoice with credit card payment built in.

ONCE THEY BOOK, THEY IMMEDIATELY RECEIVE CONFIRMATION AND CLEAR NEXT STEPS — NOT RADIO SILENCE.

Right after booking, confirmation must hit their inbox immediately, with what happens next. Example: "Thanks for booking! You'll receive a Healthcare Plan Data Checklist to fill out before our first meeting." Silence after payment kills trust.

[ONBOARDING]

A WELCOME EMAIL AND/OR WEB LINK IMMEDIATELY SETS EXPECTATIONS AND OUTLINES WHAT HAPPENS NEXT.

From the second they say yes, your onboarding should feel professional. Send a welcome email with a short video or a slick PDF saying, “Here’s what to expect, here’s what to prepare, here’s where we’ll start.” Example: a “Welcome Packet” that feels like first-class treatment.

A KICKOFF DECK OR ONBOARDING DOCUMENT IS READY TO GO, EXPLAINING MILESTONES AND STAGES OF THE PROCESS IN PLAIN ENGLISH.

Have a kickoff deck ready. A 5-slide doc that covers "Our Process," "Key Milestones," "Your Role," and "Our Role." It should make the client feel like they just bought into a predictable, proven, winning system — not chaos.

[ONBOARDING]

ROLES AND RESPONSIBILITIES ARE CLEAR FROM DAY ONE — NO GUESSING GAMES ABOUT WHO'S DOING WHAT.

Roles and responsibilities should be plain English. Example: "You assign an internal contact for benefits data. We handle plan design review and savings validation." If they think they're doing all the work, your consulting 'value' evaporates.

IT'S CLEAR HOW PROGRESS AND OUTCOMES WILL BE TRACKED, MEASURED, AND REPORTED — NO "TRUST ME, BRO" CONSULTING.

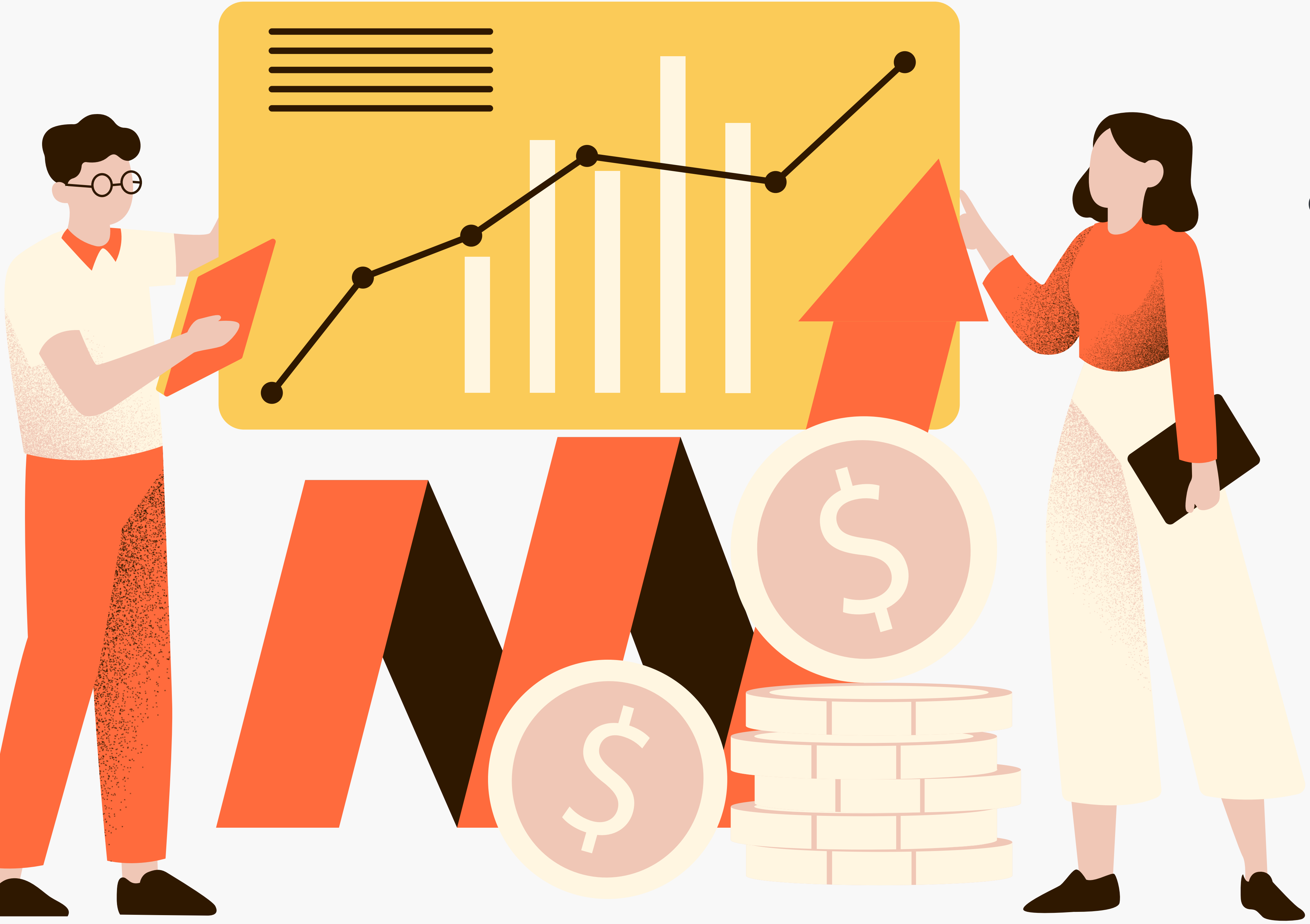
Spell out touchpoints and timelines: "Week 1: Data Collection. Week 2: Benchmark Analysis. Week 3: Presentation of Findings." If you don't set expectations, they'll fill in the gaps themselves — and you won't like what they imagine.

[ONBOARDING]

CLIENTS KNOW EXACTLY HOW TO PREPARE BEFORE WE START THE CONSULTING PROCESS — NO SHOWING UP COLD TO MEETINGS.

Clients must know how progress is measured. **Example**: "You'll receive two updates: Preliminary Findings (after Week 2) and Final Report (after Week 3)." If they can't see the train moving, they'll assume it's stuck. Preparation shouldn't be a guessing game. Tell them what you need. Example: "Please provide current healthcare plan summary, and renewal pricing sheets before our first session." No surprises = faster trust.

[PROOF]



I HAVE REAL CASE STUDIES AVAILABLE AND VISIBLE.
MY PROFESSIONAL EXPERIENCE IS CLEARLY STATED YEAR-BY-YEAR — NOT JUST "20 YEARS IN THE INDUSTRY" FLUFF.

Show proof that you're not just some guy with a laptop. Testimonials, case studies, even before-and-after examples like: "Company XYZ reduced their healthcare spend by 18% without cutting benefits." No proof, no purchase.

[PROOF]

ITHERE ARE CREDIBILITY MARKERS (CERTIFICATIONS, AFFILIATIONS, MEDIA MENTIONS) VISIBLE AND EASY TO REFERENCE.

Don’t just say “I’ve been in the business for 20 years.” Instead, walk them through it: “Started in 2005 in voluntary benefits consulting, transitioned to healthcare cost optimization in 2012, specialized in self-funded transitions since 2016.” Specific dates = instant credibility.

I PROVIDE AN NDA WHEN NEEDED TO REMOVE ANY HESITATIONS ABOUT SENSITIVE INFORMATION..

Always offer to sign an NDA early. It’s the fastest way to drop prospect defenses. “Of course, we’re happy to provide a standard NDA — protecting your data and plans is part of how we work.” Make it sound normal, not scary.

[PROOF]

IMY CONTRACTS ARE WRITTEN IN HUMAN LANGUAGE, NOT "ANCIENT ROMAN SCROLL" LEGALESE.

Keep your contracts human-readable. Example: “If we don’t deliver a final report showing at least $100,000 in savings, you get your money back. Full stop.” Lawyers write contracts like puzzles. You write them like you're serious about doing business.

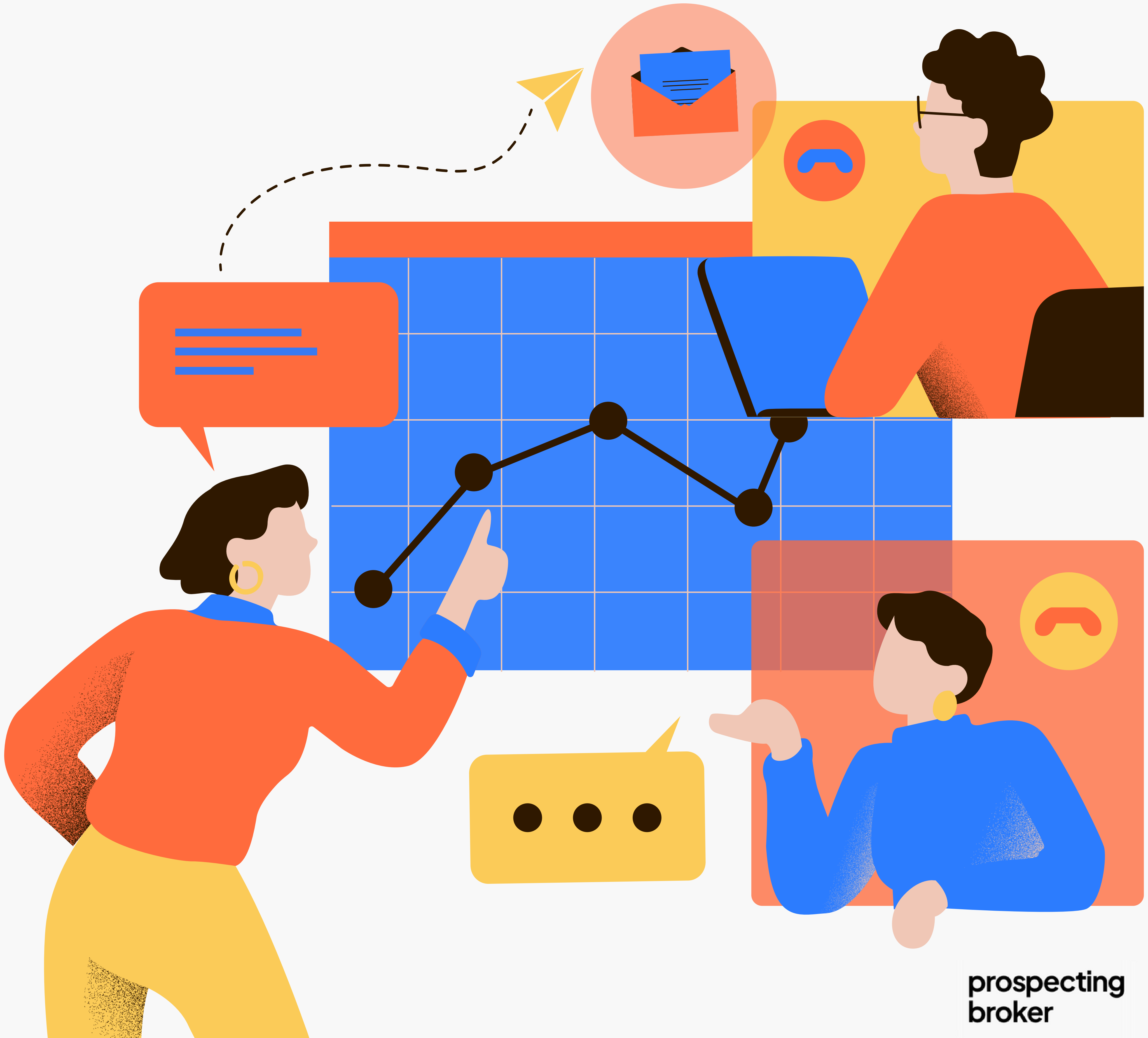
FLEXIBLE PAYMENT TERMS ARE AVAILABLE IF NEEDED, LIKE 30-DAY INVOICES.

Offer flexible payment terms when it makes sense. Example: "50% due at kickoff, 50% 30 days after deliverables are received." CFOs like vendors who understand cash flow realities, especially in midsize companies.

[PROSPECTING]

THERE IS A FOLLOW-UP SYSTEM IN PLACE FOR PROSPECTS WHO EXPRESSED INTEREST BUT DIDN'T BUY - BECAUSE NO DEAL IS DEAD UNTIL YOU BURY IT.

And finally, always follow up. Every prospect who almost bought should hear from you again. Example: A week later, send a note: "Still considering cost containment solutions? We'd love to walk you through a few case studies showing recent results." Persistence beats talent in sales — every time.



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[PROSPECTING]

I HAVE A UNIQUE, BRANDED NAME FOR MY OFFER.

A unique, branded name cuts through the noise and instantly elevates you above the commodity pile. Imagine a prospect saying, "They offer the Value Creation Assessment" instead of "They offer some free call thing." Branding isn't just a logo; it's what makes people remember you five seconds after they close the tab. Without a branded name, your offer sounds optional. With one, it sounds proprietary, exclusive, and valuable.

A PROSPECT CAN EXPLAIN MY OFFER TO THEIR BOSS OR PARTNER IN 30 SECONDS OR LESS.

If someone can't explain your offer in under 30 seconds — without needing to open a Google Doc or text you for clarification — you don't have an offer, you have a homework assignment. Complexity kills momentum. A real offer sounds like this: "They'll audit our healthcare plan, find waste, and if they don't find 10X their fee in savings, we get our money back." Short, punchy, and directly tied to a financial result.

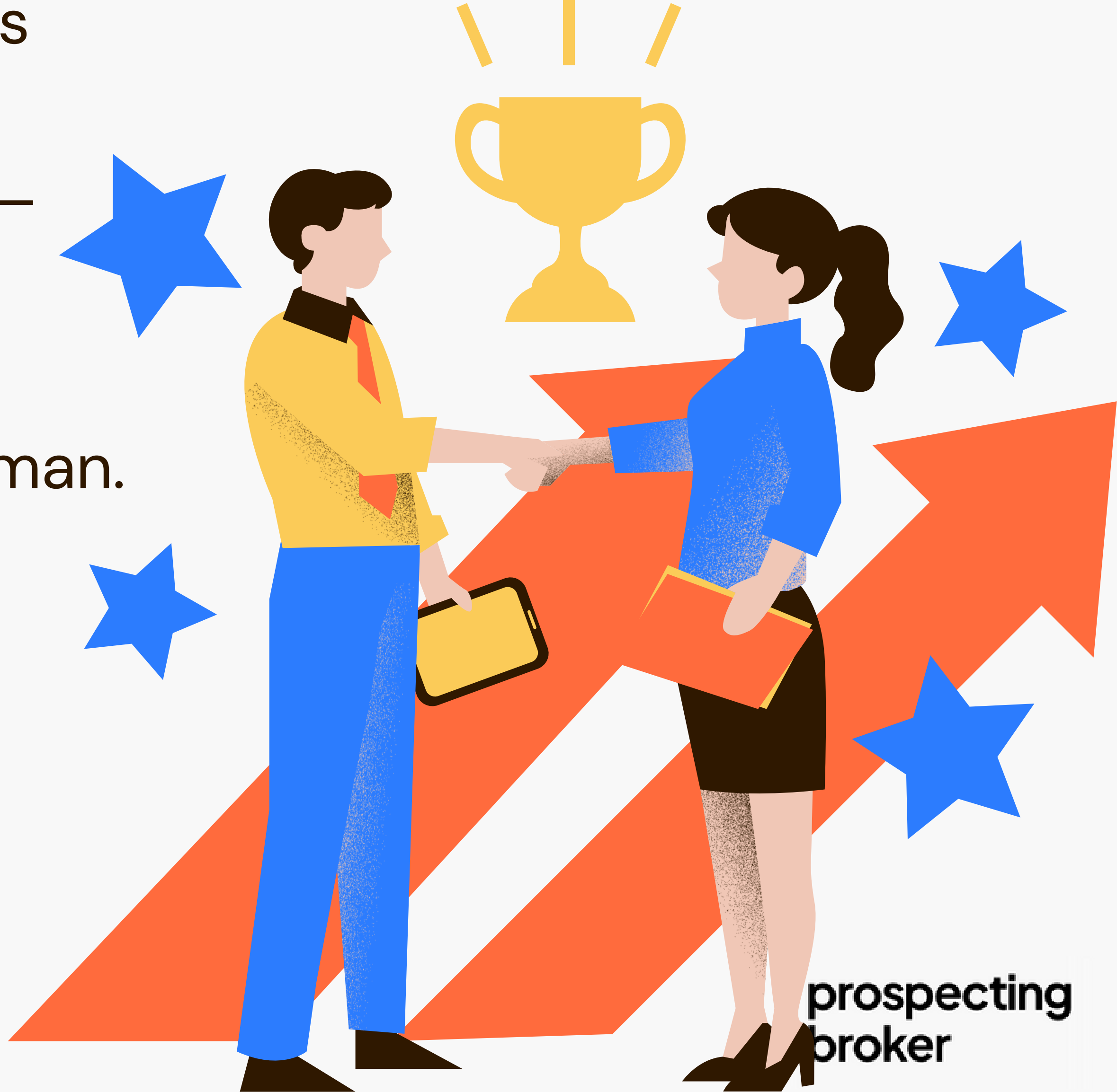
[PROSPECTING]

I HAVE VIDEO, PROOF, AND POSITIONING ASSETS READY TO BUILD TRUST IMMEDIATELY.

Trust isn't earned slowly anymore — it's won (or lost) in the first 30 seconds someone checks you out. If you don't have a sharp proof stack — short client testimonials, quick case study videos, a clear positioning statement — you're relying on hope marketing. And hope is a terrible business plan.

Proof makes you real. Positioning makes you credible. Video makes you human.

Even a 90-second video saying, "Here's how we saved $400,000 for a company just like yours," does more work than ten pages of text. Stack proof, polish your positioning, and show your face. Invisible brands don't get paid.



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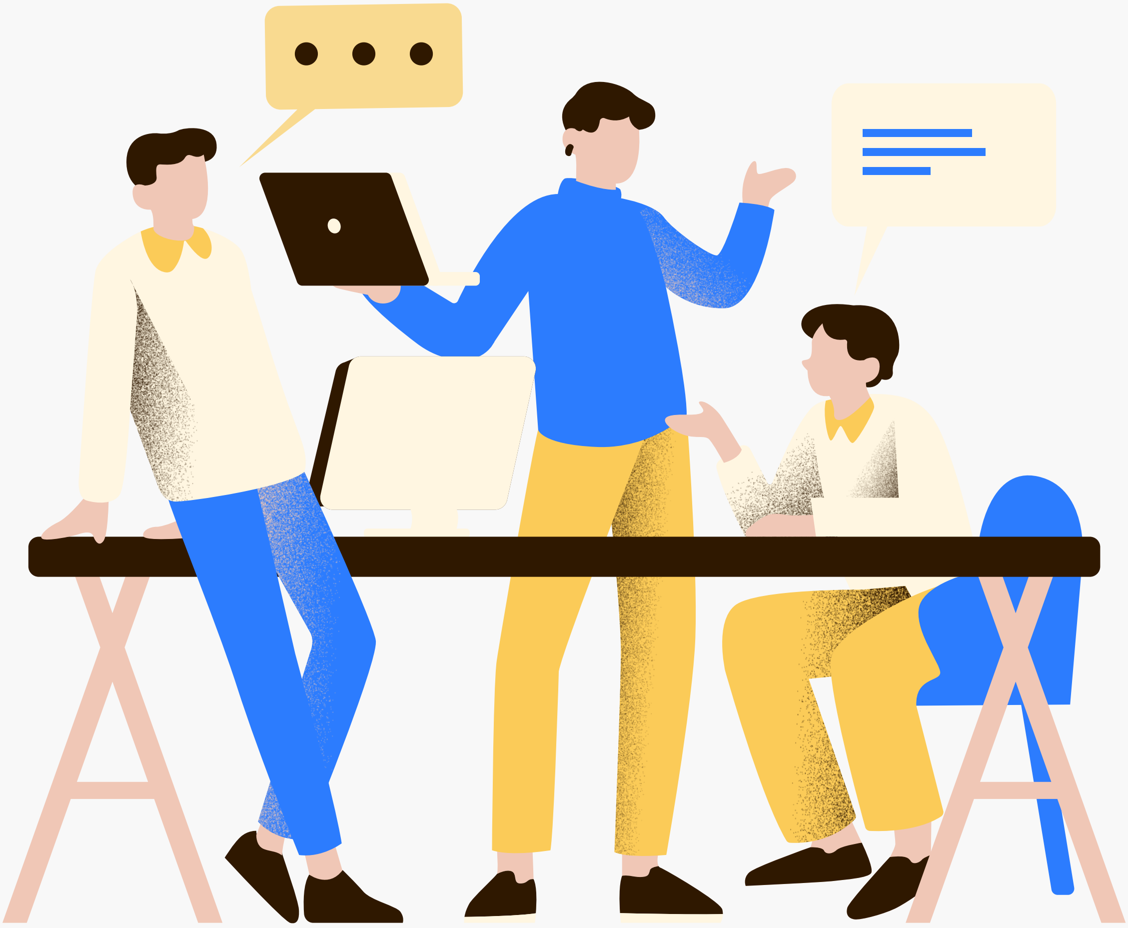

PROSPECTING CALCULATOR

CLICK TO ACCESS

METRIC	Production Output per Action
VALUE PER MEETING	$12,000
VALUE PER CALL	$300
VALUE PER OUTREACH	$15,000

TAKE THE GUESSWORK OUT OF PROSPECTING.

Most brokers have a number in their head – "I want to make $800K this year." Cool. That's not a plan, that's a fantasy. What they don't have is the math. The actual actions. The daily reps. So they wake up every morning either overwhelmed or overconfident – and both get you nowhere.

That's why we built the Prospecting Calculator. It turns that big sexy revenue goal into something predictable, and doable.
How many calls. How many meetings. How many closes. Period. You see the gap between where you are and where you say you want to be – and once you see it, you can't unsee it. You either close that gap... or you keep lying to yourself.