STREAMLINING SERVICES

Creating Processes and Products that Sell | Marie Palacios, Funding For Good

Funding For Good
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First Steps to Creating New Products

2

Defining Products in Way that Attracts your Ideal Audience

3

Streamlining Processes to Save Time, Money, and Headaches

4

Quick Tips and Checklists to Edit for Ongoing Success

WHAT WE WILL COVER

POLL: Where are you in your consulting business?

A. It's a side-hustle

B. I'm getting ready to start my business

C. I've established my business but have so much to learn.

D. I'm a seasoned consultant seeking fresh ideas

September 16-18 | Asheville, NC
https://nonprofitconsultingconference.org/

FIRST STEPS TO CREATING NEW PRODUCTS

What you "could, should, and will do."

MAKE A LIST

What are <u>at least 25</u> services you <u>could</u> offer or products that you could sell?

COULD VS. SHOULD

How does it fit into your business model?

Can you maximize revenue opportunities?

Is it your unique brilliance?

CURRENT REALITIES

Ask: "What do I know to be true about my business?"

Consider a S.W.O.T. + Achievements

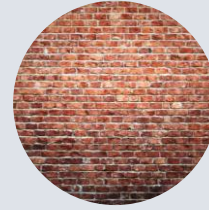# MAXIMIZING YOUR UNIQUE BRILLIANCE

LOVE it + Good at it	LOVE it + NOT good at it
DISLIKE it + Good at it	DISLIKE it + NOT good at

SAMPLE STRATEGY SESSION"

Focus on <u>one</u> potential service/product at a time

What do I feel are my biggest <u>blocks</u> to increasing revenue?

How might I <u>focus</u> my services to increase revenue?

What does "<u>SUCCESS</u>" look like for me in 2-3 years?

What <u>must I do</u> in the next 12 months to get closer to my 3-year goals?

BREAKING IT DOWN: POTENTIAL GRANT SERVICES

✓   Grant Readiness

🔍   Prospect Research

✏️   Grant Writing

🏛️   Program Design (strategy sessions, budgeting, template creation)

📄   Grant Narrative (template creation)

👥   Proposal review

🧠   Coaching

💡   Consultation (retainer or on-demand)

SAMPLE STRATEGY:

TRANSITIONING TO TEMPLATE-BASED SERVICES

Clarify: "Why might I make this move?"

- Reduce "grant deadline stress"
- Ensure I don't find myself operating as an employee
- Streamline grant clients
- Increase the quality of ongoing grant processes and proposals for clients
- Maximize short-term engagement opportunities
- Better equip clients to pursue grant opportunities
- Grow project-based billing opportunities

DEFINING PRODUCTS

What you deliver not just what you do.

MESSAGING 101

WHO is my ideal audience?

What PROBLEM will prompt them to seek my services?

What SOLUTION do I offer?

What ACTION do I want them to take?

What MESSAGING do I need to engage them?

CONVERTING PROSPECTS INTO CLIENTS:
WHAT THEY NEED TO KNOW

PRODUCT

- You will walk away with…

PROCESS

- We take these steps to achieve your goals…

CORE TEMPLATE COMPONENTS

1. Purpose of the Program or Project

2. Organizational History

3. Executive Summary

4. Needs Assessment/Statement of Need

5. Program Description / Project Design

6. Goals & Objectives

7. Evaluation Methods

8. Capacity/Sustainability Plan

9. Budget

10. Budget Justification/Narrative

Walk away with an editable grant template that includes…

PROMOTE PACKAGES VS. STAND-ALONE SERVICES

Header	GOOD	BETTER	BEST
What's Included			
Price/Savings			
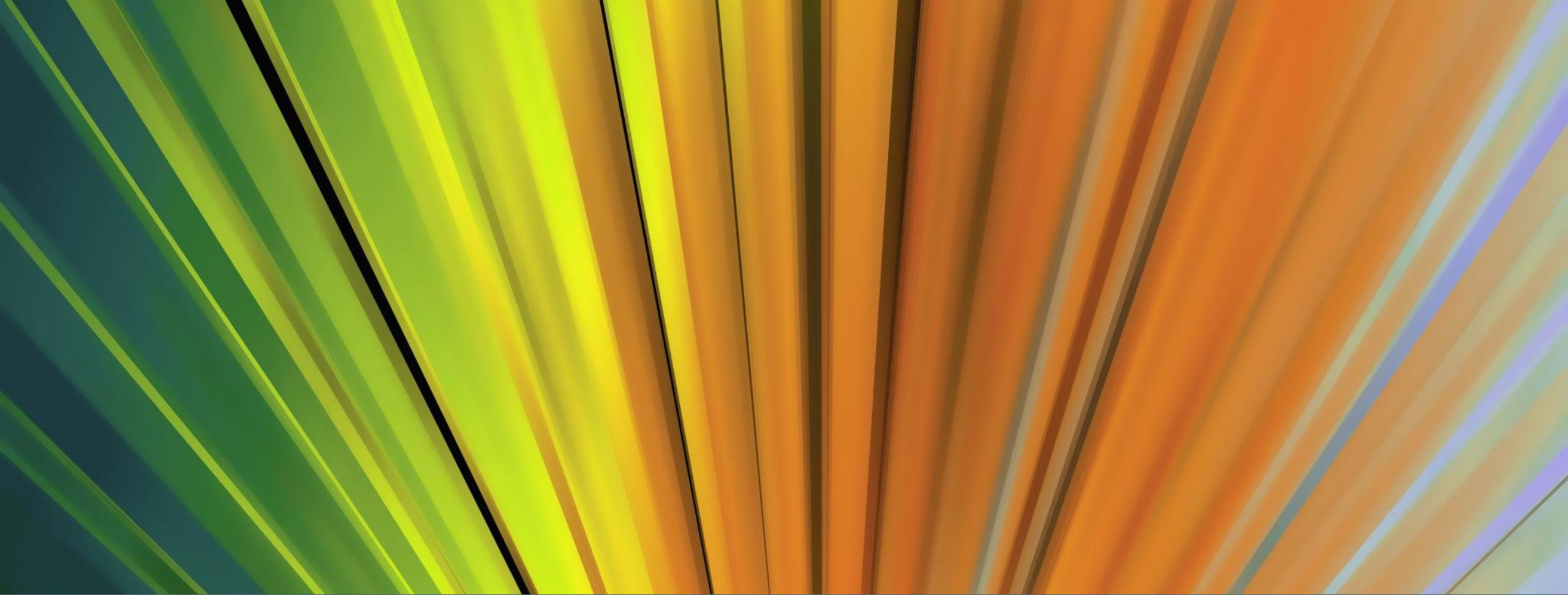
STREAMLINING PROCESSES

Working smarter not harder

BRAINSTORM: WAYS TO STREAMLINE SERVICES

Process	Barriers to Consider	Strategies to Increase Efficiency	Docs/Systems to Create	Context Notes
Screening Potential Clients				
Contract Considerations				
Intake Processes				
Content Collection				
Analysis/Review				
Recommendations				
Decision-making				
Drafting Processes				
Review/Editing				
Approval				
Follow-up Support				

SCREENING PROSPECTIVE CLIENTS

Questions to Consider:

- Who is the designated point of contact?
- What is their role within the organization? (decision-maker?)
- What is the organization's history in the service area and current realities?
- Will grants fund a program or project?
- Are grant prospects already identified?
- When do they need a template in hand?
- What expectations/requests do they have?
- What do you need from them to deliver a quality product?
- How much time do you anticipate spending in each process step?
- How much time are you asking clients to contribute?
- What is a realistic engagement period?

USE CONSISTENT, COMMON LANGUAGE

To describe your process- (Exploratory call, intake call, strategy session, clarity call, etc.)

To clarify the next steps/expectations- (The PURPOSE of _, Who should participate? How to prepare for __)

To request drafting content- (Provide a prompt in highlighted, such as "Complete this statement in x sentences or less."

For template language and conversation language- (Program description vs. program design, etc.)

For template-specific content- (Headers, content notes, etc.)
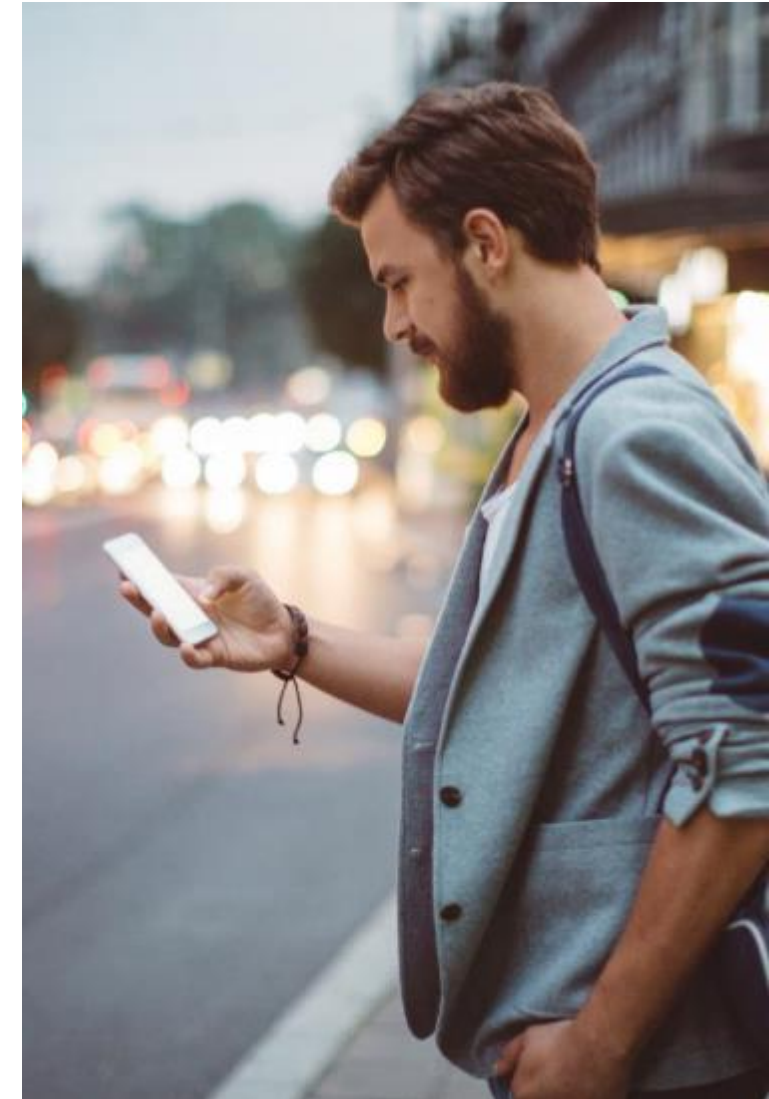
QUICK TIPS AND CHECKLISTS

Getting started and staying focused

CHECKLIST:

☐ **Confirm services that align with your skills, passion, and business model.**

☐ **Define your ideal audience**

☐ **Bullet point all products and processes for clarity**

☐ **Craft detailed messaging that aligns with your audience**

☐ **Use targeted systems to streamline work** (call scheduling, reminders, team management, file sharing, etc.)

☐ **Create a toolkit so clients understand and can use the product.** (Checklist, video tutorial, things to remember in the margin of the source template

☐ **Outline key expectations/deadlines in the contract and stick to them.** (Consider pause clause, no response consequences, and what is deemed "acceptance" of the final product.*)

☐ **Pre-craft emails for each step of the process"**

☐ **Prepare a "Proposed next steps" document with popular options and early bird rates.**

LESSONS LEARNED THE HARD WAY

Lesson 1. Just because a client says they have something you ask for doesn't mean they do.

Lesson 2. Goals will always need to be reviewed, reframed, or created.

Lesson 3. Don't ever give clients free rein in a shared document.

Lesson 4. Clearly define an ideal and maximum number of decision-makers

Lesson 5. Track actual hours worked per client. Re-evaluate processes and pricing accordingly.

CONTINUALLY EVALUATE PROCESSES AND PROFITS

What's working? What's not? What can I do to save time and generate more money while delivering a stellar product?

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March 26
Streamlining Back Office Operations

April 30
Wellness and Work: Finding Balance

May 28
Customizing Client Proposals

June 25
Learning to Say "No" with Confidence

July 30
Exploring Coaching vs. Consulting

August 27
Exploring Education vs. Facilitation

September 24
Managing Client Conflicts

October 29
Streamlining Services: Questions to Consider

November 26
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- Yes, Please.
- No, Thank You.

Q + A