

1 What's a big project you can help them with that would likely add huge value to their business?

Be strategic. Pick the kind of thing you'd like to do for the client, considering your current capabilities and reputation. But do not anchor on the kinds of services you already provide.

2 Design a small project that leads to that big one:

It needs to both (1) add a lot of value and (2) clearly demonstrate the need and how difficult it will be, either in effort or expertise, to perform the big project. Start with a price that is easy and quick for the decision-maker to approve, then build the scope around the price.

3 What are the biggest risks and/or opportunities the prospect needs to learn about for the small project to be seen as urgent and important?

Focus on risks need to include both (1) uncertainty and (2) potential for harm. High uncertainty and no potential for harm does not justify hiring an external consultancy. Low uncertainty and high potential for harm can be easily dealt with by internal resources or hiring productized solutions.

4 How can you show or uncover those risks and/or opportunities to the client?

What information, insights, and ideas can you offer?
What open-ended questions can you pose to stimulate their thinking?
What best practice or common thinking can you challenge?

5 Brainstorm demand-generation initiatives that lead to that small project:

They must: (1) be easy for you to create and execute, (2) valuable and consultative for them, and (3) create urgency and make a compelling case for change.